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THE GOLDWATER-NICHOLS DEPARTMENT OF DEFENSE
REORGANIZATION ACT OF 1986:
AN ANALYSIS OF AIR FORCE IMPLEMENTATION OF TITLE IV AND
ITS IMPACT ON
THE AIR FORCE OFFICER CORPS

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Disclaimer

The views expressed in this academic research paper are those of the authors and do not reflect the official policy or position of the US government or the Department of Defense.

Preface and Acknowledgments

The passing of the Goldwater-Nichols Department of Defense Reorganization Act of 1986 was a landmark event, significantly altering the way Military Services, and Congress conduct business. Yet, because of its complexity and depth, most Service members do not fully understand how the legislation affects professional military education (PME), career progression and utilization—for the law can have long-range effects on future assignments, the timing and selection of PME courses, as well as career paths for Air Force (AF) officers. Title IV was Congress’ legislative attempt to improve the overall quality and coordination of joint operations by enhancing the quality and education of those officers assigned to joint positions.

Title IV of the legislation, Joint Officer Personnel Policy, is probably the most complex and least understood portion of the legislation, yet it has the most direct impact on the officer corps. After the Act’s passage in 1986, Title IV became the focus of concern to the then Air Force Chief of Staff, General Larry D. Welch. In a statement to the House Armed Services Committee on 28 May 1987, General Welch asserted, “The single area requiring further discussion is Joint Officer Personnel Policy.” He further stated, “Certainly, officer personnel policy is a subject worthy of our most careful attention since it heavily impacts both our ability to provide trained, equipped, disciplined forces and quality support for joint commands and organizations.”¹

¹ General Larry D. Welch, chief of staff, US Air Force, “titles IV and V of Goldwater-Nichols Department of Defense Reorganization Act of 1986,” address to the House Armed Services Committee Investigations Subcommittee, Washington DC, 28 May 1987.

Because of Title IV's importance to the officer corps and its complexity, our research group assumed the task of demystifying this title of the Act by providing a brief synopsis of the legislation and an analysis of its implementation and compliance/non-compliance by the AF. In concert with this effort, we analyzed the current Officer Professional Development (OPD) Program to determine its compatibility with Title IV. We believe our synopsis of Title IV's history, our status report on Air Force compliance/non-compliance, and our candid analysis and recommendations will lead to a better understanding of Title IV and its importance to the Air Force and its officer corps.

Our paper is the result of countless interviews and contacts with a myriad of personnel and agencies. We would like to extend a special thank-you to Colonel Norm Rathje, Vice Commander, Air Force Military Personnel Center (AFMPC), for his sponsorship of this important undertaking. We would also like to acknowledge the following individuals for their dedicated efforts, for whom without, this project would not have been possible: From AFMPC, we'd like to thank, Vaughn Blackstone, Assignment Procedures Advisor; Major Frank Provenzano, Chief, Military Education Branch; Captain Larry D. Hall, Chief, Joint Officer Management Branch; Captain Alfred E. Bruner, Chief, Joint Duty Assignment Management Section; Captain Donald Barnes, Recorder, Selection Board Secretariat; and Master Sergeant Beth Compton, Chief, Joint Officer Development Section. We would like to extend a special thanks to our AFMPC analyst, Captain Dave McCormick, Strategic Force Analyst, whose many hours of dedicated 'number crunching' added substance to this paper. Additionally, from the Air Staff, we'd like to thank, Lieutenant Colonel William R. Berger, Chief, Professional Programs, Education and Training Division; Lieutenant Colonel Jack Hales, Chief, Strategic Plans Unit; Lieutenant

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Abstract

In 1986, Congress enacted the Department of Defense Reorganization Act, directing how Services manage joint officers, in an effort to improve the quality of joint officers and operations. This research paper analyzes AF legislative compliance in: promotions, assignments, education and joint specialty officer (JSO) designations for field grade officers. The research analyzes the initial law and subsequent amendments to establish a compliance baseline and examines AF, Joint Staff and Secretary of Defense records to assess conformity. After the compliance review, the research examines programs, policies and laws affecting compliance, followed by a study of the integration of Title IV concepts in the OPD Program. There were two non-compliance areas—promotions and JSO guidelines. First, despite a multitude of initiatives involving promotion board processes and assignments, AF failed 41 of 46 promotion categories, although significant improvement was noted. Second, there were no established JSO career guidelines and there were negative perceptions regarding joint duty in OPD. To improve compliance, this paper recommends better integration of joint concepts in OPD; the establishment of JSO guidelines; and an aggressive media effort to enhance perceptions of joint. Further, it advocates the inclusion of OPD counseling during mandatory performance feedback and the implementation of existing legislation affecting JPME outplacement. Last, it recommends revitalizing ‘cross-flow’ assignments between Air and Joint Staffs, and establishing a comprehensive data-base to enable more extensive analysis of joint management initiatives. It is the general opinion of the researchers that AF has made a

concerted effort to meet Title IV mandates and with the implementation of additional modifications or ‘enhancements,’ AF should be in full compliance.

THE GOLDWATER-NICHOLS DEPARTMENT OF DEFENSE REORGANIZATION ACT OF 1986: AN ANALYSIS OF AIR FORCE IMPLEMENTATION OF TITLE IV AND ITS IMPACT ON THE AIR FORCE OFFICER CORPS

Chapter 1: History of Goldwater-Nichols Act

“It is broke, and we need to fix it.”¹ Senator Barry Goldwater spoke these words on 3 October 1985 during a Senate floor speech in reference to the Defense Department’s organization and decision-making procedures. What led to this rather harsh statement was not a recent, or single event. It was the realization that a series of mishaps and a consistent pattern of parochialism within the military, dating back as far as the Spanish-American War to the more recent bombing of the Marine barracks in Lebanon, the failed Desert One Iranian hostage rescue mission, and aspects of the 1983 invasion of Grenada, were cause for dire alarm and immediate action. Specifically, he cited the inability of the Joint Chiefs of Staff (JCS) to provide useful and timely military advice; the poor performance in joint operations; the insufficient quality of the staff of the Organization of the Joint Chiefs; the confused command lines; and the lack of adequate advocates for joint interests in budgetary matters.²

Although more than twenty major studies and individual proposals on the reorganization of the US military were initiated since the informal inception of the JCS in 1942, none were able to fully succeed in rectifying the underlying problem, that being the lack of the integrated employment of land, sea and air forces, in other words, ‘jointness.’

After two unpopular and indecisive wars, Korea and Vietnam, and the aforementioned mishaps, then Chairman, JCS, General David C. Jones, United States Air Force (USAF), shook the foundation of joint service inter-operability by writing the article “Why the Joint Chiefs of Staff Must Change.” The article criticized the JCS structure and processes including the lack of JCS control in selecting the Joint Staff (JS), Service parochialism, and unwieldy joint staffing procedures.³ Shortly thereafter, General Edward C. Meyer, Chief of Staff, US Army (USA), expressed his support of General Jones’ proposed reforms. Together, they were able to convince Congress that the organization of the Department of Defense (DoD), must be reassessed and that changes in operations were desperately needed if the Services were to function more effectively as a team.

What followed was a multitude of Congressional hearings, debates, and investigations. Two key investigations provided enough impetus for legislative action. The first, the Blue Ribbon Commission on Defense Management, published the report A Quest for Excellence, which reviewed “national security planning and budgeting, military organization and command, acquisition organization and procedures, and government-industry accountability.”⁴ The second investigation produced a staff report for the Senate Armed Services Committee titled Defense Organization: The Need for Change.⁵

The investigations led to similar conclusions. First, the Military Services usually put their own interests ahead of joint interests. Secondly, the advice of the JCS was not valued since it resulted from the individual Service’s consensus vote. Lastly, the combatant commanders had little control over subordinate commanders, the forces in their area of operations, and the defense budget.⁶ What resulted was a war-fighting force lacking coordination and cooperation. In 1985, General John W. Vessey, Jr., USA,

described the way we should fight. He put it this way, “Joint operations is when the unique combat capabilities of two or more of the Services come together to make the whole greater than the sum of the parts in order to kick the tar out of the enemies of the United States.”⁷ What ultimately emerged as a result of the numerous studies and investigations was the Goldwater-Nichols, DoD Reorganization Act of 1986, signed by President Reagan on 1 October 1986 as Public Law (P.L.) 99-433—a piece of legislation designed to ensure our forces could ‘kick the tar out of our enemies.’

In enacting Goldwater-Nichols legislation, Congress specifically stated its intent was:

- to improve the military advice provided to the President, the National Security Council, and the Secretary of Defense;
- to reorganize the DoD and strengthen civilian authority in the Department;
- to place clear responsibility on the commanders of the unified and specified combatant commands for the accomplishment of missions assigned to those commands;
- ensure that the authority of the commanders of the unified and specified combatant commands is fully commensurate with the responsibility of those commanders for the accomplishment of missions assigned to their commands;
- to increase attention to the formulation of strategy and to contingency planning;
- to improve joint officer management policies;
- to provide for more efficient use of defense resources [and]
- otherwise to enhance the effectiveness of military operations and improve the management and administration of the Department of Defense.⁸

Achievement of Congress’ intent would become the primary job of the Joint Staff, the very same organization and personnel Congress criticized as being of inadequate quality. The Joint Staff’s inferior reputation was due to a combination of an unfavorable

historical pattern of promotions and assignments for officers assigned to joint tours of duty; limited joint education; and negative attitudes towards joint duty by the Services.⁹ To improve the quality of joint officers and in turn achieve the intent of the new legislation, Congress incorporated Title IV, Joint Officer Personnel Policy, into the law. Title IV's importance in ensuring the legislation was properly implemented and administered cannot be overemphasized. It now becomes the focus of this paper.

Chapter 2: Title IV Synopsis

The DoD's ability to successfully employ the nation's Armed Forces is dependent on the integration of the war-fighting capabilities of the Military Services. To effectively integrate these capabilities, DoD must produce high quality officers experienced and educated in joint matters. A Senate Armed Services Committee (SASC) October 1985 report clearly stated that DoD was not succeeding in the production of such officers.¹⁰

The SASC defined quality in the following way: (1) the inherent skills and talents as professional military officers; (2) the necessary education and experience; and (3) a tour of sufficient length to become effective and to provide continuity.¹¹ Its report recommended the system of military education, training and assignments be changed to produce officers with a heightened awareness and greater commitment to DoD-wide requirements—a genuine multi-Service perspective, and an improved understanding of the other Services.¹² The report also recommended that a joint duty career specialty be established in each Service.¹³ As a result of these recommendations, legislation, in the form of Title IV, was enacted to ensure DoD reorganized its professional military education establishment and revised its officer career patterns.¹⁴

Title IV's objectives were clear—it sought to improve the quality of officers assigned to joint organizations, increase the experience and educational levels of such officers, and expand the exposure of officers to joint matters.¹⁵ To achieve these objectives, the Act established a category of officers known as joint specialty officers (JSO), defined their qualifying education and experience requirements, and set promotion

objectives for joint specialists and other officers assigned to joint duty. It also established minimum tour lengths for joint duty assignments (JDA) and required a JDA for promotion to general/flag officer (G/FO).¹⁶

A more detailed description of Title IV provisions follows:

Establishes an occupational category, referred to as the 'joint specialty' for the management of officers who are trained in and oriented toward joint matters

Provides that joint specialty officers (JSO) shall be selected by the Secretary of Defense (SecDef) from nominees submitted by the Secretaries of the Military Departments

Requires that an officer may not be selected for the joint specialty until a program of joint education and a full joint tour are completed

Requires 50 percent of joint duty positions in grades above captain/Navy lieutenant be filled by officers who have been nominated or selected for the joint specialty

Directed the SecDef to designate at least 1,000 critical joint duty assignments (JDA) that must always be filled by JSOs

Requires the SecDef to establish career guidelines for JSOs

Requires, subject to a waiver by the SecDef, that all officers promoted to general or flag rank must attend an education course (CAPSTONE).

Requires all JSOs and a high proportion of other officers who graduate from a joint school to be assigned immediately to a joint duty position

Prescribes, subject to a waiver by SecDef, that joint duty tours shall be at least 3 years in length for general and flag officers and at least 3 1/2 years in length for other grades

Requires the SecDef to exclude joint training assignments and assignments within the Military Departments in the definition of 'joint duty assignments'

Specifies that each promotion board, subject to a waiver for the Marine Corps, that will consider officers who have served in JDAs shall include at least one joint duty officer designated by the Chairman, Joint Chiefs of Staff (CJCS)

Establishes the following review process for promotion boards considering officers:

requires the SecDef to furnish to the Secretaries of the Military Departments guidelines to ensure that promotion boards give appropriate consideration to joint duty performance;

directs the CJCS to review promotion board reports before they are submitted to the SecDef;

authorizes the Secretary of a Military Department, if the CJCS determines that the promotion board acted contrary to SecDef guidelines, to return the report to the promotion board for further proceedings, convene a special promotion board, or take other appropriate actions

directs the SecDef to take appropriate action to resolve any remaining disagreement between the Secretary of a Military Department and the CJCS

Requires the SecDef to ensure the qualifications of officers assigned to JDAs (to include JSOs not serving-in JDAs) are such that certain promotion rates will be achieved (specific rates discussed later)

Requires, subject to SecDef waiver, that an officer may not be promoted to general or flag rank unless he has served in a JDA

Requires the CJCS to evaluate the joint duty performance of officers recommended for three- and four-star rank

Requires the SecDef to advise the President on the qualifications needed by officers to serve in three- and four-star positions¹⁷

Overall, the Services have struggled with Title IV's implementation. Many of the early implementors shared the sentiments of Colonel (Ret) John B. Keeley, USA, who wrote the following in an issue of Army: "Congress has created a disaster in the establishment of a joint officer management system (Title IV). In a mere eight pages, Congress has turned inside out the carefully constructed career development programs of the Services—programs that have taken years to develop are the very foundations of the military professions."¹⁸

Because of complaints by the Services, Title IV has experienced numerous modifications. First, in April 1987, DoD submitted legislative proposals for modifying Title IV. In these submissions, DoD proposed (1) changing tour lengths for joint assignments; (2) redefining promotion objectives; (3) permitting waivers of the education and experience requirements applying to joint specialists; (4) delegating authority for selecting joint specialists; and (5) designating in-Service billets as joint assignments.¹⁹

The National Defense Authorization Act (NDAA) for fiscal years 1988 and 1989 was Congress' attempt at reconciling some of the competing provisions of the original Act and to permit effective and efficient officer personnel policies without compromising the goals of the reorganization law. The new legislation addressed several of the DoD proposals but failed to approve all of them. Specifically, it modified the joint officer policies to allow waivers of certain education and experience requirements for joint specialists, permitted authority for designating joint specialists to be delegated to the Deputy Secretary of Defense (DepSecDef), and allowed officers to accumulate credit toward joint tour length requirements when tours have been terminated for specified reasons.²⁰ Although not proposed by DoD, it also included changes restricting specialties that could be designated critical occupational specialties (COS) involving combat operations and the availability of short tours for officers in these specialties.²¹

The Air Force, firmly committed to the Act's implementation, embraced these changes and began to work towards full compliance. During a 1988 Air Force Times interview with then Deputy Chief of Staff, Personnel, Lieutenant General Thomas Hickey stated, "the Air Force has embraced jointness as an integral part of its mission."²² He further said that, "under the heading of joint duty, Air Force officers are being told that the

Air Force mission is largely an all-service mission and that they should be ready to work with their Army, Navy and Marine Corps counterparts.”²³

Another change to Title IV took place in 1993. The 103rd Congress passed a bill providing joint duty credit for equivalent duty in Operations DESERT SHIELD and DESERT STORM. Additionally, it passed a bill providing additional flexibility in the assignment of officers graduating from Joint Professional Military Education (JPME) schools by allowing up to one half of the required 50 percent of officers to fulfill the post-JPME requirements during a second assignment following graduation. As we will see later, these provisions provide much needed relief to the Services.²⁴

Although the Air Force has made significant progress towards full compliance with Title IV, there is still work to be done. Our in-depth analysis in the following chapters addresses Air Force compliance with the mandates of this legislation, focusing on its problems and successes. Further, we will examine other legislative efforts and Service policies and programs which have impacted Air Force’s ability to comply with the intent of Title IV. We will limit our focus to the personnel management aspects of the legislation, restricting our research to the areas of JSO designation process, promotions, assignments and JPME for lieutenant colonels and below. After our compliance review, we will address the impact of Goldwater-Nichols legislation on OPD—an area which we found little historical research.

As you read this paper, it is important to remember the relative newness of the legislation limits the available data to support our research and affects any long-term conclusions we can make concerning Title IV’s impact on the AF officer’s career. Because of limited number of officers having cleared all the career wickets, we have a very

small baseline from which to make our assumptions. We hope the information which follows provides a solid foundation for further research into Title IV and its impact on the AF officer.

Chapter 3: Joint Specialty Officer Designation and Career Guidelines

To ensure the Services produced officers trained and oriented toward joint matters, the Goldwater-Nichols DoD Reorganization Act of 1986 required each Service to create an occupational category for joint officers—the JSO, and to establish career guidelines for officers of that specialty.²⁵ Eligible officers are those who complete a full program of JPME and a full joint tour—PME must be completed by the end of the joint tour unless the officer is in a career field considered as a COS. A COS officer possesses a military occupational specialty selected from among the combat arms in the Army or equivalent military specialties in the Navy, Air Force and Marine Corps.²⁶ Equivalent military specialties are those engaged in the operational art to attain strategic goals in a theater of conflict.

To conduct this research, one of our researchers visited AFMPC to review all JSO Designation Board documents for boards conducted from 1987 to 1993. Information pertaining to demographics was also obtained from the Center’s Personnel Data System (PDS) historical tapes and from a variety of historical files maintained at the Center.²⁷ In reviewing AFMPC documents, researchers found the AF has selected over 5,400 officers for the JSO designation via a JSO Designation Board process—approximately 2,860 were lieutenant colonels and below, the subject of this paper. The AF conducted designation boards in two phases—the first, a transition period during 1987-1989, in which officers did not have to meet all designation requisites; and those post-transition boards, conducted in 1991, 1993, and most recently in 1995, where officers were required to meet

all JSO designation requisites, unless waived on a case-by-case basis by DepSecDef. As such, this chapter will first examine the two phases of the JSO designation process—transition and fully qualified. Additionally, it will provide an analysis of the AF JSO revalidation effort, in which they revoked the JSO designation status of over 300 officers. Last, this chapter will examine AF initiatives to establish and monitor career guidelines for the JSO.

First, from 1987-1989, the AF conducted three transition boards for lieutenant colonels and below, during which over 2,780 JSOs were designated.²⁸ Although the law required JSOs to complete a complete program of JPME followed by a full JDA, during the transition provisions of the Act, only one of the two requisites was required for designation and the JPME/JDA sequence requirement did not apply.²⁹ Further, the transition guidelines allowed for joint equivalent tour counters—that is officers who were currently in, or had been previously assigned to “in-Service positions in which significant interdepartmental interface and liaison, involving above staff functions, conducted on a routine basis,” received credit for a JDA.³⁰ Each board member was charged by a letter of instruction to “select a pool of officers to be nominated to the DepSecDef for approval of the award of the Joint Specialty . . . and to ensure that the officers selected for nomination have the highest standards of performance, experience, and education.” For all boards, the instructions, which were approved by the Chairman or Vice Chairman, JCS, further stated, “it is expected that the officers nominated shall have the same overall quality as those officers selected for assignment to the Service headquarters staffs.”^{31 32 33}

According to AFMPC archives (JSO Designation Board Briefings; AFMPC/DPMR Operating Instructions, 36-15, Joint Specialty Officer Board Procedures;³⁴ and working

papers), the AFMPC staff conducted a pre-board quality review to eliminate officers who met the following conditions from board consideration:

- Existing Unfavorable Information File
- Weight Management Program participant
- A ‘2’ in the last five Officer Effectiveness Reports (OER)
- An Article 15
- Control Roster action
- Drug/Alcohol Abuse Control Program entry
- Promotion propriety action³⁵

Mirroring the AF promotion selection process, board scoring was based on a 6.0 to 10.0 half point scoring range and was conducted by secret ballot, with the board reviewing the officer selection folder, which contained OERs, Training Reports, an official photograph, decoration citations, along with an officer selection brief, which is a computerized product containing the assignment history, grade information, time-in-service, etc. Differing from the promotion process, each officer was considered by AF Specialty Code or Major Weapon System (MWS), with a JSO Designation Board Worksheet submitted from the officer’s assignment team to the board. This worksheet highlighted JSO qualification data and provided an overall assignment team joint utility assessment to be considered when evaluating the officer for award of the joint specialty designator. An order of merit was established by the board—the JSO selection rate was based on AF Specialty Code or MWS, considering joint duty or joint critical assignment requirements. Each designation board had a General Officer board president and at least one board member, currently serving in a JDA, appointed by the CJCS, to serve as his representative on the board. The three transition boards were conducted in three phases—the 19-23 October 1987 board which considered 1,972 officers currently in JDAs. Second, there was the 7 -18 March 1988 board which considered 3,944 officers

with at least two years of joint duty and/or JPME, along with officers identified by assignment teams as having Joint Equivalent assignments. Last, there was a 28 March-7 April 1989 board, which considered 4,375 officers who met the above criteria and were not selected for designation by previous boards, in addition to newly identified officers, who were identified as a result of a re-scrub of the eligible officer data-base. What was unique regarding the last transition board was that assignment teams were more involved in identifying their projected joint requirements.³⁶ Although the board proceedings were well documented^{37 38 39} and complied with the mandates of the law and guidance published in the 21 May 1987, 22 July 1987 and 4 February 1988 DepSecDef Memorandums,^{40 41 42} there were some long-term problems associated with this mass-designation process.

First, the Joint Duty Assignment List (JDAL) is a fluid document, with frequent changes to Service mix, AF Specialty Codes, and grade alignment.⁴³ The transition JSO designations were based on the first JDAL publication, dated 1 September 1987.⁴⁴ As a consequence, officers were designated as JSOs, although their future joint utility was based on current joint requirements—designated on speculation, many times based on an assignment officer's or analyst's best estimate for future joint requirements. Further, officers were designated early in their careers before their promotion potential could be fully assessed. This proved to be very costly when the AF failed to meet the promotion expectations years after the transition designation process—once a JSO, an officer's promotion status is always monitored and measured against the Service headquarters promotion rate. This will be further discussed in the following chapter on promotions. It appears the main driver behind the mass transition designation was the size and composition of the early JDAL and the legislative requirement to fill 50 percent of the

positions with JSOs or JSO nominees. The AF produced enough of a JSO pool to sustain this 50 percent fill requirement, until they could begin producing fully qualified JSOs, which was projected for 1992. Concern for meeting the 50 percent fill rates led to the transition-era designation of over 5,300 colonels and below—over 80 percent of whom had JPME or JDA waived for designation.⁴⁵ Unfortunately, as mentioned above, the long-term promotability and utility of this pool was deficient, despite the detailed pre-designation analysis and quality scrub. Another interesting factor was officers deferred to lieutenant colonel were designated as JSOs during the transition period, which appears to be in conflict with the overarching legal mandate for JSOs to be at least the same or higher overall quality as the Service headquarters staff.⁴⁶ Although there were some long-term problems generated by the transition designation era, the designation process appeared to be in compliance with the mandates and intent of the Goldwater-Nichols legislation—to identify a pool of officers educated and experienced in the employment, deployment and support of unified and combined forces to achieve national security objectives.

The first post-transition JSO Designation Board using fully qualified requisites was conducted in December 1991. Like the transition boards, the board instruction, which emphasized the board's responsibility to nominate officers with the highest standards of performance, experience, and education were approved by CJCS. The Chairman also appointed an officer currently serving-in a JDA as his representative. Similar to transition boards, the AFMPC staff conducted a quality review of those eligible officers competing for designation since the board was instructed to select officers with "the highest standards of performance, experience and education," and "the same overall quality as officers selected for assignment to the Service headquarters staff."⁴⁷ The board reviewed the

records of 35 fully qualified officers to be nominated to the DepSecDef for award of the Joint Specialty designator—of those 24 were recommended for designation. In contrast with the large transition boards of 1987-1989, officers were not considered by AF Specialty Code or MWS eligibility categories. There were 16 additional officers considered for designation waivers, which are limited by law to 10 percent of the number of JSOs designated annually, by grade. Accordingly, one mission support officer was recommended for designation by (sequence) waiver, based on completing his JDA in advance of JPME.⁴⁸

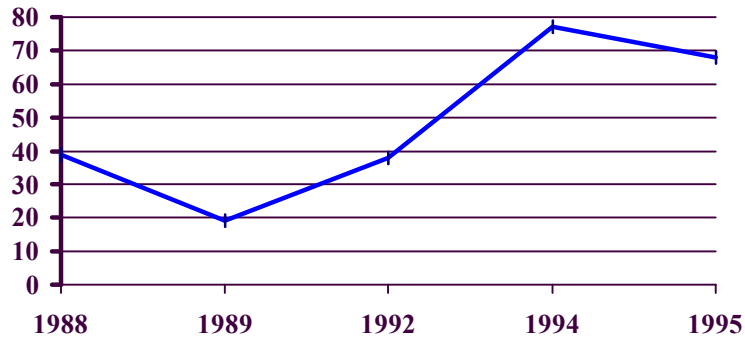
What is noteworthy about this board is: 1) the small eligibility population; 2) the selection for designation without regard for AF Specialty Code or MWS; and 3) the high selection rate—69 percent of those fully-qualified were nominated for selection. What influenced the small eligibility population was that only two years transpired since the previous (transition) JSO Designation Board, which was a small time-frame for officers to have completed their JPME and JDA. Additionally, the staff culled those officers with quality indicators, deferred promotion status or approved retirement or separation dates—this significantly reduced the eligibility pool. As for the selection without regard for AF Specialty Code or MWS, the eligibility pool was so small and there was a high opportunity to be assigned to joint special duty assignments if selected for JSO designation, so there was joint utility regardless of career field. Last, the higher selection rate appears to be related to the high quality of the eligible pool, which encompassed in-resident PME graduates and officers selected for below-the-zone promotion (BPZ). Since the Service headquarters quality is the law's measuring stick for JSOs, it appears that the board met the expectation by selecting top quality officers for designation.

The next JSO Designation Board was conducted in October 1993. Of the 404 officers considered, the board nominated 60 to DepSecDef for designation, resulting in a 15 percent selection rate. The board was administered much like the 1991 board; however, there appears to have been more focus on selecting officers in AF Specialty Codes or MWSs with a high probability for future joint utility, e.g., Intelligence and Communications/Computers officers, were selected at much higher rates than the board average, 24 and 34 percent, respectively.⁴⁹ The board instructions and procedures mirrored the 1991 process.

The AF conducted its most recent JSO Designation Board in March 1995. Although results have not been approved by SecDef as of the date of this paper, the preliminary selection results show that of 660 considered, 192 or 29 percent were selected for designation. Of those designated, 68 percent were BPZ to one or more grades. The researchers did not accomplish a compliance review of this board, because it was recently conducted and the results have not been completely staffed, or approved by SecDef.

What is significantly different between recently conducted boards and the transition boards of 1987-1989 is the remarkable improvement in the JSO quality. For example, 39 percent of the all 1987 board designees were BPZ to one or more grades. This dropped to 19 percent for those designated by the 1988 and 1989 boards; however, grew to 77 and 68 percent for the 1993 and 1995 boards, respectively. The nine percent decrease in BPZ officers selected for the 1995 board does not necessarily denote a reduced quality, in light of the fact over three times as many officers were designated. Figure 1 shows the BPZ trends for JSOs based on the year designations were approved and updated in the personnel data system. As such, the 1987 board is reflected as 1988,

and the 1988 and 1989 boards are shown as 1989. Both the 1991 and 1993 boards were not approved or updated until the following year; therefore, they will be reflected on Figure 1 as 1992 and 1994, respectively.⁵⁰

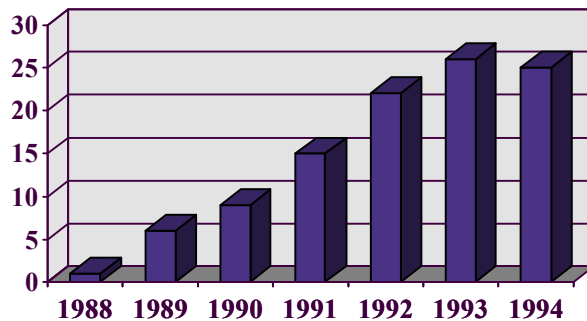


Source: AFMPC/DPMYAF

Figure 1: JSO Designation Percent BPZ Selects

This same quality improvement can also be seen by examining the number JSOs who were resident PME graduates when selected for designation. For instance, in 1989, only 33 percent of newly designated lieutenant colonel JSOs had resident Intermediate Service School (ISS) and only 7 percent had resident Senior Service School (SSS), as compared to 1994 when 100 percent of lieutenant colonels were ISS resident graduates and another 51 percent had resident SSS. The 1995 preliminary results also show a similar trend, for 100 percent of the majors and 99 percent of the lieutenant colonels had resident ISS.⁵¹ Based on the high quality of JSOs in the post-transition era, it is apparent AF has been aggressive to ensure future promotion expectations will be met. Unfortunately, it is difficult to establish precisely when this compliance will occur, for as long as yesterday's transition JSOs are still in the inventory, they will continue to affect AF compliance with Goldwater-Nichols.

The deficient, long-term promotability of the transition pool can best be shown by examining the deferred promotion rates. In 1988, only 1 percent of JSOs were deferred; however, as the pool aged, its deferred rate increased to a high of 26 percent in 1993. It was this long-term quality issue which served as the catalyst for AF to conduct an in-depth analysis of the composition of the JSO pool, which eventually led to the first JSO revocation action taken by any Service in 1993. Figure 2 shows the deferred for promotion rates of the JSO pool.⁵²



Source: AFMPC/DPMYAF

Figure 2: JSO Pool Percent Deferred

As mentioned, AF conducted a SecDef approved JSO revalidation process beginning in the Summer of 1992 and completing in April 1993. The intent of the revalidation effort was to identify surplus JSOs for revocation of the JSO designator by the SecDef. As background, what initially prompted such action was AF's failure to meet the JSO promotion objectives for several promotion boards—JSOs were not being promoted at the Service headquarters rate. Consequently, AFMPC examined the JSO pool and determined that of the transition JSOs, 42 percent had never served in a JDA.⁵³ They also found there were 11 JSOs for every critical joint billet and there were JSOs in career fields with no

joint critical requirements, e.g., Air Traffic Control, Weather, Missile Maintenance, Finance, Security Police, and Special Investigations.⁵⁴ An AFMPC briefing to the Air Force Director of Personnel (AF/DP) in February 1992 highlighted the concern that the AF must count JSOs who “haven’t and won’t serve in JDAs. . . .” also, “these JSOs skew our pool’s actual joint utility; less assets than what’s reflected” and “we over-designated during the transition period and now must cull our pool.”⁵⁵ At that time, there had never been revocation action taken by any Service and no formal revocation procedures existed. This action was not specifically addressed in Title 10, and there was only a draft DoD Directive on Joint Officer Management, stating that SecDef may revoke JSO status on a case-by-case basis. The draft Directive was clear in stating that non-promotion could not be the sole basis of revocation action.⁵⁶ However, the AF was not considering revocation based on non-promotion. Instead, justification was there were surplus JSOs in career fields with no future joint utility. Promotion results were merely the catalyst to conduct a complete review of the JSO assets.

Following an in-depth analysis of the JSO pool, AF staffed a request for a JSO ‘revalidation’ through CJCS to the Assistant Secretary of Defense, Force Management and Personnel (ASD (FM&P)) for approval. On 29 June 1992, AF was granted ASD (FM&P) approval to proceed with a one-time revalidation of the JSO designator of 450 officers” “based on the draw-down, the AF’s reorganization, and the uncertainties surrounding the initial JSO designations.”⁵⁷ An interesting side note is the Army followed suit with the revalidation effort, and in April 1993 they also received approval to conduct a one-time revalidation of their JSO pool.⁵⁸ Apparently, overproduction of the transition pool was not AF unique.

The revalidation process was very objective. First, the AF identified all transitional JSOs who had not served in JDAs. The second objective criteria was to eliminate from revalidation consideration those JSOs who had not served in a JDA, but were either resident PME graduates or BPZ promotees—both positive quality indicators.⁵⁹ On 11 August 1992, 311 officers were notified by an AFMPC/CC letter that their JSO designation status was being reviewed for revocation consideration. The letter indicated that revocation action was based on an excess of JSOs designated under the DoD Reorganization Act of 1986 transition rules and the existence of a more stringent process to designate new JSOs. These officers were given opportunity to refute the administrative revocation action in writing by 8 September 1992. Affected officers were provided a comprehensive overview of the revalidation effort, along with background information on Goldwater-Nichols legislation and the JSO transition designation period. The Fact Sheet stated, “Because the Air Force is producing fully qualified JSOs under the new standards, and due to extensive force restructuring within Department of Defense, there is no need to retain JSO officers selected under the transition boards who will not be required to serve in a critical joint position.” The Fact Sheet further stated, “JSO revocation is strictly a classification action and removes the member from the pool of officers considered for assignment to a critical joint requirement.”⁶⁰

The revalidation process served its purpose to eliminate surplus JSOs in career fields with limited joint critical utility. The process was objective—if a JSO had not served in a JDA since designation (a 4-5 year period) and did not have a high probability to serve in a joint critical requirement, they had their JSO administrative designator revoked. Individuals were notified in advance that they were being considered for revocation action

and they were educated on the process. Further, they were given an opportunity to provide information why this action should not take place. The revalidation effort was approved in advance by ASD (FM&P) and final revocation action on 311 officers was approved by SecDef after being staffed through the Director, Joint Staff.⁶¹ The affected officers were advised of the revocation approval on 21 May 1993. and the PDS was updated in June 1993 to reflect a code 'W' for those officers.⁶² Based on the limited number of JSOs being generated by fully qualified boards, it may take several years to regenerate a replacement pool of fully qualified JSOs with high joint utilization; however, it is probably prudent to say if a transition JSO was not utilized in a JDA in the 4-5 year period following their designation, their future joint utility was limited.

As stated earlier in this chapter, the SecDef, with CJCS advice, is responsible to establish career guidelines for officers designated as JSOs. These guidelines are more extensive than the JSO selection process for they also encompass “military education; training; types of duty assignments; and such matters as the Secretary considers appropriate.”⁶³ When legislation was imposed, AF already had “highly visible, viable career development guidelines for each utilization field.” These guidelines were published in Air Force Regulation (AFR) 36-23, Officer Career Development, which provided AF officers a comprehensive overview on career development program ‘elements’ such as PME, training, educational assignments, with optimal phase points. At the time of the law’s implementation, this regulation already incorporated (brief) references to joint duty, via career progression guide charts, presented by utilization field. The AF, realizing the need for additional emphasis on joint, chose to use this regulation as the media vehicle; however, with modifications to strengthen the emphasis on joint duty and education as a

part of an officer's overall career development.⁶⁴ Essentially, they attempted to meet the requirement with the modification of a pre-existing publication.

A review of AF/DP Program Action Directive (PAD) 87-1, Implementation of The Goldwater-Nichols Department of Defense Reorganization Act, Title IV, Joint Officer Personnel Management, 23 January 1987, also stated AF's intent to use AFR 36-23, to implement JSO career guidelines. The PAD did mention a feasibility study of developing a separate JSO Career Management Directive; however, this was never pursued. In the end, the AF modified AFR 36-23 to reflect the importance of joint assignments and education.⁶⁵ Our research team reviewed the regulation and determined that although joint education and assignments were mentioned, specific guidelines for the joint specialty were never defined. This same joint emphasis was reflected in the publication of Air Force Pamphlet (AFP) 36-13, Officer Professional Development, published 1 March 1989, where approximately a page was dedicated to 'joint departmental' assignments in Chapter 9.⁶⁶

The AF will supersede AFR 36-23 and AFP 36-13 with the publication of the AFP 36-2630, Officer Professional Development Guide, which is in final coordination.⁶⁷ In its coordination form, this pamphlet does not address Goldwater-Nichols legislation, although joint duty is mentioned throughout as a requisite for General Officer promotion, and as being critical to war-fighting.⁶⁸ Although the joint specialty is mentioned several times, it is never defined.

The intent of this pamphlet is to provide officers by career field an overview of each career path; providing the reader information on different tracks; i.e., broad, staff, operations, leadership, technical expertise, etc. Each career field has a career path matrix,

which “shows the types of jobs and experience that are mandatory, essential, desired, or optional for success. . . .”⁶⁹ Without exception, joint duty is mentioned in every career field with joint requirements, with some variations noted between rated and support fields. In the rated officer path, joint is viewed as staff position option in the leadership track. The pamphlet states, “In this track, a person will have a solid flying background and a mixture of high-level staff jobs (MAJCOM [Major Command], Air Staff **or joint**).”⁷⁰ The support career paths dictate a stronger line on the importance of joint by stating, “A joint-duty tour is a mandatory requirement for promotion to general officer (GO). Officers should consider joint duty early in their field grade career so they do not limit their options when promoted to colonel.”⁷¹ As stated earlier, nowhere in the career paths is the JSO provided any specific guidelines concerning career development. The focus of the pamphlet is that joint duty is key to war-fighting; a balanced career includes staff duty (of which joint is an option); ISS students should expect either a JDA, MAJCOM, or Air Staff assignment; and if an officer aspires to be a GO, joint duty should be acquired early as a field grade officer. How joint duty is integrated into AF’s OPD program will be further discussed in Chapter 8.

Has AF met the intent of the law to “establish career guidelines for joint specialty officers”?⁷² If the intent of the law was to provide concrete career guidance to JSOs, then as shown above, they have failed. If the law’s intent was to provide a system to track and monitor JSOs, then they have succeeded. The AF clearly identifies JSOs in their personnel data-base, on Officer Selection Briefs (OSBs) for promotion boards, and when a JSO is pending assignment upon graduation from a National Defense University (NDU) school. The AF also closely tracks JSO nominees via their PDS—they have a firm grasp of which

officers have met the education and assignment requisites to become a JSO. This same JSO career guidelines issue surfaced in an AF/DPXOX staff summary sheet, 29 January 1992, when AF/DP recommended a game plan to ensure AF meets the promotion requirements of Title IV. The recommended course of action was to develop a formal program to ensure JSOs are counseled by assignment officers “on professional development opportunities (assignment and education)” . . . to ensure they “remain competitive for promotion.”⁷³ Although this plan was approved by Vice CSAF, the research team could find no indication a system was ever formalized to provide JSOs career guidelines. As such, the research team concluded that AF failed in its responsibility to provide career guidelines for JSOs, although they did provide a structure to monitor their career progression via promotions and PME outplacement.

Chapter 4: Promotions

Title IV contains numerous joint requirements pertaining to the promotion of AF officers. For sometime, the quality of officers in joint assignments has been of great concern to Congress, DoD, and the CJCS. In order to maintain a certain level of quality in joint assignments, Congress dictated in law procedures and thresholds that apply to the promotion process. This chapter reviews the provisions of the law applying to AF officer promotions; provides a comparison showing whether the AF met these provisions; briefly addresses other factors affecting joint officer promotions; and provides recommendations on how to improve compliance.

First, the provisions of the law require the quality of officers in joint duty be such they are expected to be promoted at certain levels; that the CJCS participate in the promotion process; that certain promotion procedures be followed; and that promotion rates are reported to Congress. Since DoD reports the joint promotion rates to Congress, this chapter concentrates on the first three requirements. Appendix C1 provides a more detailed summary of the provisions in the law by section.

The scope of this paper is limited by the law and policy. Based on DoD policy the joint promotion requirements in the law apply only to Line of the Air Force competitive category officers and those billets with authorized grades above captain.⁷⁴ This policy excludes the other seven competitive categories in the AF: Judge Advocate General Department Officers, Chaplain Corps, Biomedical Sciences Corps, Medical Service Corps, Nurse Corps, Medical Corps, and Dental Corps. Since 10 United States Code (USC) 661

provides that only officers in the grade of captain or above may be selected for the joint specialty, only those boards to major and above are tracked for joint promotion expectations. This paper only addresses promotion boards to the grades of colonel, lieutenant colonel, and major; promotion rates to the grades of brigadier and major general are not discussed. Also, this research focuses on officers on the active-duty list as provided in 10 USC 620, Active-duty Lists, and those promotion boards convened in accordance with (IAW) 10 USC 611, Convening of Selection Boards.

The particular requirements of these three areas warrant closer attention prior to reviewing how the AF has complied with the provisions of the law. The promotion levels joint officers are measured against depend on the kind of joint position or organization the officer is assigned to, or whether an officer has received the JSO designator. The JSO designation process is outlined in Chapter 3. Three joint promotion categories were established by this legislation: Joint Staff, JSOs, and Other Joint. Officers are placed in the Joint Staff category if they are assigned to the Joint Staff, or have been assigned to the Joint Staff. Officers are placed in the JSO category if they have been designated by the SecDef as a JSO. The JSOs who are assigned to the Joint Staff are counted in both the Joint Staff and JSO categories. Officers are placed in the Other Joint category if they are assigned to or have been assigned to a billet in joint assignments listed on the JDAL. Officers coded as JSOs and/or Joint Staff are not included in the Other Joint category. The promotion rates for officers on the Joint Staff are compared to the promotion rates for officers on the Air Staff; promotion rates for JSOs are compared to the promotion rates for officers on the Air Staff, and promotion rates for officers in other joint assignments are compared to the promotion rates for the Service average (Line of the AF

board average). The promotion rates used are the actual selection rates figured for each category as a result of a promotion board. The selection rate is a percentage computed by dividing the number of officers selected by the number of eligible officers. These assessments are conducted for officers competing for promotion In-The-Promotion Zone (IPZ), Below-The-Promotion Zone (BPZ), and Above-The-Promotion Zone (APZ) in each category. Officers selected for promotion IPZ are those selected on time with their peer group; those selected BPZ are promoted ahead of their peer group; and those selected APZ are promoted after their peer group. Within these categories, the promotion rates are also compared for those officers currently serving-in and those who have-served in these areas, except for JSOs and the Service average. JSOs are designated by qualification, not by the position they are assigned to; therefore, they are not divided into the serving-in and have-served categories. Tracking of officers in the have-served category is only accomplished for the first promotion board following reassignment out of a joint organization or the Air Staff.

Several procedures are in place to involve the CJCS in the promotion process. First, he approves the joint representatives to promotion boards. Second, the CJCS reviews results of promotion boards which consider joint officers. In this review, he determines if the promotion board followed SecDef guidance regarding joint officers and gave appropriate promotion consideration to joint officers. The CJCS reviews the board results and provides determinations and comments to the Secretary of the Air Force (SecAF). Based on his determinations and comments, SecAF transmits the report to SecDef or takes other actions as appropriate to alleviate CJCS concerns.

Other requirements of the law mandate each board considering the promotion of joint officers will have a joint officer on the board. Also, the promotion board will be instructed to ensure appropriate consideration is given to the performance in joint duty assignments of officers who are serving-in or have-served in such assignments. The law requires SecAF provide the CJCS the board report for review when joint officers have been considered by the board. Further, the law that requires processing of promotion boards through the CJCS also applies to Special Selection Boards (SSB) reports.

Since the passing of Goldwater-Nichols legislation on 1 October 1986, the AF implemented actions mandated by the law and has continually updated and adjusted their efforts to comply with all aspects of the legislation. While a number of efforts have been taken in the areas of joint specialty designations, joint assignments, and JPME, this chapter focuses on compliance with joint promotion expectations. The AF implemented several procedures to provide clearly stated SecAF instructions to promotion boards regarding the importance of joint and identification of joint officers to promotion board membership. Table 5 at Appendix C2 provides a chronology of these actions and others, which have impacted AF implementation of joint officer management relating to officer promotions. One should note the effects from some actions have slowly evolved and are associated with other aspects of the joint officer management system.

The SecAF instructions to promotion board members were strengthened several times since the implementation of Goldwater-Nichols legislation in 1986. The first version provided that promotion boards “. . . should give appropriate consideration to the performance of officers who are serving-in or have served in joint duty assignments.”⁷⁵ Over the years, those words have evolved into the following: “For the Line competitive

category, joint duty experience is an extremely important consideration for promotion.

The law requires that the qualifications of officers assigned to joint duty be such that they are expected, as a group, to be promoted at a rate not less than the rate for all AF officers in the same grade and competitive category. There are three objectives: . . . [promotion objectives are outlined above]. It is important that these statutory objectives be met.”⁷⁶

Another initiative involves joint officers being clearly identified on the computer summary (OSB) in the Officer Selection Record—their joint status is indicated on the summary using the following terms: ‘Joint Staff,’ ‘JSO,’ and/or ‘Other JDA.’⁷⁷ In addition to placing these three joint officer reporting categories on the summary, the AF, in October 1993, started using an officer’s joint duty history on the summary listing the organization and dates of assignment.^{78 79} The AF has also complied with the law to have a joint officer on promotion boards considering joint officers for promotion. The processing of SSB reports through the CJCS is also mandated by the law and is being complied with by the AF.

So far the items considered have been the legislative requirements and AF efforts to meet these requirements. Now, let us consider the results of how the promotion comparisons have fared in the reportable categories. More detailed information with the actual selection percents for each board, grade, zone and category are found in Tables 6-37 contained in Appendices C3-C5.

Three comparison schemes are provided:

- As a group average promotion rates (Appendix C3)
- As a group by board promotion rates (Appendix C4)
- Serving-in and have-served by board promotion rates (Appendix C5)

This review revealed the detailed areas that perhaps warrant continued monitoring and emphasis:

- Officers meeting colonel boards IPZ and BPZ serving-in the Joint Staff
- Officers meeting colonel boards IPZ, BPZ and APZ that have-served on the Joint Staff
- Officers meeting lieutenant colonel boards IPZ serving-in the Joint Staff
- Officers meeting lieutenant colonel boards BPZ that have-served on the Joint Staff
- Officers meeting major boards BPZ that have-served on the Joint Staff
- JSOs meeting colonel boards IPZ and BPZ compared to officers that have-served on the Service headquarters
- JSOs meeting lieutenant colonel boards IPZ and BPZ
- JSOs meeting lieutenant colonel boards APZ compared to officers serving-in the Service headquarters
- Officers meeting colonel boards BPZ serving-in Other Joint assignments
- Officers meeting colonel boards IPZ, BPZ, and APZ that have-served in Other Joint assignments
- Officers meeting lieutenant colonel boards APZ that have-served in Other Joint assignments
- Officers meeting major boards APZ that have-served in Other Joint duty assignments

Table 1 summarizes how well the AF has met promotion expectations based on comparison Scheme 3 and specifically provides the number of boards the particular categories have met or exceeded the promotion requirements of the law. Those possible problematic areas are bolded; these areas have met the promotion expectations on fewer than 50 percent of the promotion boards. For example, colonels serving-in the Joint Staff

meeting the board IPZ met or exceeded the requirements of the law on only two of six boards. A number of these categories have met the law's requirements for each board held or for all boards except for one; these categories are underlined. In addition, to identify those boards that were close to meeting the promotion expectations, one more select was added to boards not meeting the expectations. These categories with one select added that would have met or exceeded the law's requirements for all boards held are annotated with an asterisk. The remaining areas that met promotion expectations less than 50 percent of the time are bolded.

Table 1 below shows 5 of 46 categories have met the promotion expectations for all boards in that grade, zone, and assignment (or designation in the case of JSOs). Another eight categories have met the promotion expectations for all but one board in that grade, zone, or assignment (or designation in the case of JSOs). Both of these categories are underlined. Another 10 categories would have met the promotion expectations on all boards with one more select added in that grade, zone, and assignment (or designation in the case of JSOs). These categories are identified with an asterisk. So far this shows 23 of 46 categories either met or came close to meeting the promotion expectations. In addition to these 23, 16 other categories were significantly below compliance for promotion expectations and warrant future monitoring. However, four of these categories show promise. Officers meeting colonel boards BPZ serving-in the Joint Staff have only met promotion expectations on two of six boards; however, those two have been in the last three boards. Officers meeting lieutenant colonel boards IPZ serving-in Joint Staff have only met promotion expectations on two of seven boards; however, those two boards were the last two boards held. JSOs meeting lieutenant colonel boards IPZ have

met expectations on the last board held calendar year 1994 (CY94), both in the serving-in and have-served categories. The other 7 categories fall in the median and warrant consideration; but, perhaps not as much as the 16 categories which have shown less than sterling results.

Table 1: Attainment of Promotion Rates by Grade and Category⁸⁰

	IPZ	IPZ	BPZ	BPZ	APZ	APZ
	Serving-in	Have-served	Serving-in	Have-served	Serving-in	Have-served
Colonel						
JT Staff	2 OF 6*	2 OF 6	2 OF 6	0 OF 6	<u>5 OF 6*</u>	2 OF 5*
JSO	<u>5 OF 6</u>	1 OF 6	4 OF 6	1 OF 6	4 OF 6	3 OF 6
Other JT	<u>5 OF 6</u>	1 OF 6	1 OF 6	2 OF 6	<u>5 OF 6*</u>	1 OF 6
Lt Col						
JT Staff	2 OF 7	3 OF 6	<u>7 OF 7</u>	1 OF 6*	3 OF 6*	3 OF 6*
JSO	2 OF 7	1 OF 7	0 OF 5	0 OF 5	2 OF 7	5 OF 7
Other JT	<u>7 OF 7</u>	5 OF 7	<u>6 OF 7*</u>	<u>6 OF 7*</u>	<u>7 OF 7</u>	3 OF 7
Major						
JT Staff	<u>3 OF 4*</u>	<u>3 OF 3</u>	2 OF 4*	1 OF 3*	N/A	N/A
Other JT	<u>6 OF 6</u>	4 OF 6	<u>5 OF 6*</u>	3 OF 6*	4 OF 6*	1 OF 5*

Source: AFMPC/DPMYAP

Note: The underlined categories met expectations for all boards or all boards except one. The asterisks denote those categories that would have meet expectations for all boards with one more select added. The bolded categories are possible problem areas which have met the expectations on 50 percent or fewer of the promotion boards.

Several enhancements of the AF joint officer management system have been made since 1987. The AF may not have reached the point where the full benefits have been realized from all enhancements. Some of these initiatives take years to evolve and may or may not impact promotion rates. Therefore, promotion rates should be reviewed in the above manner after each calendar year.

The promotion system as it relates to joint officers is not a ‘closed’ system. Other factors have a considerable impact on the management of the promotion system and joint officers. This section highlights other aspects of the law impacting AF’s ability to comply with the mandates of Goldwater-Nichols legislation.

Title 10, Sections 616 (a) and 617 (a) require promotion boards to select the “. . . best qualified . . .” officers for promotion. All of the AF promotion boards conducted since the monitoring of joint officer promotion rates have met the criteria of selecting the best qualified officers for promotion, even though not all of the joint promotion expectations were met. For those boards where the joint promotion rates did not meet the requirements of 10 USC 667, the CJCS was satisfied that the boards gave appropriate consideration to joint officers and followed SecDef guidance regarding joint promotions. Additionally, DoD approved all the boards and the Senate confirmed promotion of all the officers as the best qualified officers for promotion. The question becomes which law should take precedence: 10 USC 616 (a) and 617 (a), the selection of the best qualified officers, or 10 USC 667, expectations of joint promotion rates. In the view of the researchers, the promotion of the best qualified officers for promotion must take precedence, since the joint promotion comparisons are expectations established by Congress to ensure quality officers are assigned to joint duties—the intent of Congress does not appear to be to direct the promotion of joint officers over more qualified and talented officers. Unfortunately, in times of ‘missed’ promotion rates, the focus has been misplaced on the promotion selection aspects of joint officer management, e.g., strengthened board charges, identification of joint officers to the promotion board, etc. The question is why is the quality of officers assigned to joint duty lower than the

expectations? To answer, we must look to the training, education, assignment, and OPD of joint officers. When the AF equally assigns its best to both joint assignments and Service requirements, the joint promotion rates should improve, and the conflict between the best qualified and joint expectations will be resolved.

In addition to joint, promotion boards give consideration to multiple special interest groups, e.g., Acquisition, women and minorities, thereby making the board process more involved and perhaps more difficult to meet the joint provisions of the law. Since both Acquisition and joint promotion tracking is relatively new, the interface between the two systems is still being examined. However, as both of these systems and Service billets compete for the best qualified officers; the management of professional development through assignments becomes increasingly difficult. These assignments have a direct impact on meeting or not meeting promotion expectations. In other words, the assignment of non-joint officers affects joint promotion rates as much as the assignment of joint officers. Also, there is a direct correlation between the organization and position an officer is assigned against and the promotion category in which an officer is tracked. Last, the JSO designation process has a direct relationship on the quality of JSOs, which also impacts the promotion rates.

This gets more complex as we consider career fields with a high proportion of joint billets, but with a lower percentage of general officer and colonel positions. In effect, the AF may 'push' to fill these joint billets with quality officers, who in the long term have very limited assignment opportunities. This is contrary to the ideal of promoting the best qualified officers for future leadership positions, no matter what the career field. It seems to be illogical to require large numbers of officers in a particular career area to serve joint,

and then promote them; but not provide them an adequate number of leadership positions. This inconsistency between promotions and joint assignments needs to be evaluated and changes made.

Several other dichotomies between the promotion of officers and the assignment process are worth mentioning. The promotion of the best qualified officers is accomplished by competitive category regardless of career area; however, the assignment selection process is accomplished by career area. The assignment system assigns officers to joint positions by career area based on duty performance; however, the promotion system uses more than just duty performance in the selection of officers for promotion. AFI 36-2110 provides that the primary selection criterion for assignment is “. . . the person’s qualification to fill a valid military requirement . . .”⁸¹ “Secondary factors such as volunteer status, time on station (TOS), deferment from assignment selection, or other criteria . . .” and “. . . individual preferences, join-spouse, humanitarian, or special circumstances to the degree possible.”⁸² On the other hand, selection for promotion is based on the whole person concept, using evidence of potential to serve in a higher grade. Such evidence may be found by considering job performance, professional qualities, leadership, depth and breadth of experience, job responsibility, academic and professional military education, specific achievements, and any other facet of the officer’s record.”⁸³ The mismatch between the two systems needs to be studied in greater depth.

Considering the mismatches in the promotion and assignment systems, how should the AF select the right officers early enough in their careers, send them to joint duty, and still continue to provide the Service breadth and depth enroute to leadership positions? The researchers believe the answer is through OPD. The AF is prohibited in pre-selecting

officers prior to promotion boards without having the safeguards provided in law and policy during any such pre-selection boards. So how is the Service supposed to know who will get promoted next year, or in 2 years, or in 10 years? The officer promotion system is supposed to be tamper proof in order to provide for a fair and equitable opportunity for all officers, without using any directed promotions to meet rates for joint, Acquisition, women, or minorities. Because officers progress at different rates, a 'late bloomer' kept in AF channels could later advance over a joint officer who may have quickly progressed early in their career, but faded. The AF needs to re-engineer their OPD program in order to provide in depth coherent linked management of joint and non-joint to give the United States the "... youthful, vigorous, fully combat-ready officer force" that Congress has been concerned with since as early as 1861.⁸⁴

Other activities underway may affect joint promotions. The DoD JDAL study is considering proposals to: reduce the JDAL; add captain (03) positions to the JDAL; change organizational joint content; and, add certain Service positions. All of these proposals, if implemented, will impact joint promotion management to some degree. This impact needs to be continuously evaluated to ensure professional development initiatives are appropriately adjusted to ensure congruence with these modifications. In addition, a current RAND Corporation study of officer careers is looking at extending officer careers and expanding promotion windows. If accepted by DoD, the results of this study need to be scrutinized from a joint perspective.

So what should the AF do? In our view, the AF needs to continue to closely monitor and analyze joint promotion rates in all categories. For example, the AF monitors officer promotion timing and opportunity through a Management Information System

(MIS). However, no MIS has been created to track joint promotion rates. Granted, promotion rates are reported by the AF to the Joint Staff, and to the DoD, and thereafter reported to Congress. This is accomplished on a board-by-board basis and in an annual DoD report. However, AF should consider tracking promotion rates by category in addition to the by-board analysis. As the result of this type of analysis, this research detected that 13 of 46 categories have met promotion expectations on none or one board. Additionally, of five boards considering JSOs for BPZ promotion to lieutenant colonel, the promotion expectations were not met for any of the boards either in the serving-in and have-served categories. The AF should also ensure tracking systems are implemented to evaluate any initiatives to improve joint promotion rates. For example, the JSO status of 311 officers was revoked in 1993. Although this revocation was based on future utilization, this action was prompted by failure to meet promotion expectations. Have all of these officers filtered through the system and has there been a positive impact on promotion rates? An analysis of this revocation pool shows that 153 of the 311 are still on active duty. Of these, 109 are lieutenant colonels—23 or 21 percent of which are one or more times deferred for promotion to colonel. This deferred rate is two percent lower than the Air Force average in 1994; nonetheless, JSOs are compared against Air Staff promotion rates.⁸⁵ Further, a review of the promotion board results shows that the revalidation initiative does not appear to have enhanced AF compliance for JSOs competing BPZ for lieutenant colonel. In summary, if joint officer promotions fail to meet the expectations, AF must analyze why and then modify its overall management of joint officers to ensure compliance.

So what recommendations do we have? First, the exact promotion expectations comparisons need to be clarified. The ‘as a group’ comparison from the verbiage in 10 USC 662 is the root of the problem. The law provides that “Officers who have the joint specialty are expected, as a group, to be promoted at a rate not less than the rate for officers of the same grade and competitive category who are serving on, or have served on, the headquarters staff of the Air Force.” So how should JSOs (officers who have the joint specialty) be measured?

JSOs vs. Headquarters Staff (as a group)

OR

JSOs vs. Headquarters Staff (serving-in), and

JSOs vs. Headquarters Staff (have-served)

The same holds true for the Joint Staff comparison where “Officers who are serving-in, or have served-in the Joint Staff are expected, as a group, to be promoted to the next higher grade at a rate not less than the rate for officers of the same grade and competitive category who are serving-in, or have served-in, the headquarters staff of the Air Force.”

So which comparison is proper:

Joint Staff (as a group) vs. Headquarters Staff (as a group)

OR

Joint Staff (as a group) vs. Headquarters Staff (serving-in), and

Joint Staff (as a group) vs. Headquarters Staff (have-served)

OR

Joint Staff (serving-in) vs. Headquarters Staff (serving-in), and

Joint Staff (have-served) vs. Headquarters Staff (have-served)

In addition, the requirements of the law require the “Officers who are serving-in, or have served-in, joint duty assignments are expected, as a group, to be promoted to the next higher grade at a rate not less than the rate for all Air Force officers of the same grade and competitive category.” So again, which comparison is appropriate?

Other Joint (as a group) vs. Service Average
OR
Other Joint (serving-in) vs. Service Average, and
Other Joint (have-served) vs. Service Average

This is significant when the reporting requirements (IAW 10 USC 662) direct SecDef to periodically report to Congress the rates of officers who are serving-in, or have served-in, joint duty assignments. The reporting of rates as a group is not mentioned. The annual report provision in 10 USC 667 only requires reporting of the serving-in percentages. It appears the exact requirements the Services are being held accountable for need to be clarified. Clear objectives are crucial to the planning and execution of the joint management program.

Another issue mentioned earlier which needs to be resolved is the management system to track the AF's progress in the management of joint officers. First, the level of progress in the attainment of joint promotion expectations should be reviewed not only by individual boards as they process through the AF, but also by joint rates by category. A MIS may need to be instituted for each AF action taken to improve the promotion of joint officers. For example, have the recent JSO designation selection procedures improved joint promotion rates? Leadership needs to know whether more changes are needed using an on-line or off-the-shelf management system. This system must maintain inter-connectivity between the promotion system and the other management areas: PME, assignments, and JSO designation. For example, AF has recently modified the assignment system; therefore, a tracking scheme, with indicators and predictors, needs to be established to measure the impact this new system will have on joint officer management.

So in the opinion of the researchers, specific requirements of the law need to be clarified and the AF should institute a more effective tracking system. Continued monitoring of promotion rates is essential to Title IV compliance. The AF should also carefully analyze the JDAL and RAND Corporation studies' results and make any necessary changes in joint management. Last, future study of the specific career areas may also be justified. It is clear the AF must remain vigilant in its management of joint officer promotions.

Chapter 5: Assignments

As mentioned in the introduction, the Goldwater-Nichols DoD Reorganization Act of 1986 establishes requirements for a joint officer management system to include education, assignment, promotion, and JSO designation. This chapter provides an overview of Title IV assignment mandates and AF compliance with those requirements. Specifically, this chapter covers the following mandates: 50 percent of JDA positions must be filled with JSO or JSO nominees; the SecDef must designate at least 1,000 critical JDAs which must be filled with JSOs; JSOs and a high proportion of other officers who graduate from a joint school must be immediately assigned to JDAs; and Congressionally established joint tour lengths. This chapter will also cover the requirement for SecDef to exclude joint training and Military Department assignments from joint duty consideration, and the requirement for SecDef to ensure a high quality of officers are assigned to JDA positions. In the case of the last requirement, this chapter will primarily focus on the assignment selection process for joint duty positions.

The Goldwater-Nichols Act requires SecDef to identify JDA positions to be managed by each Service and published in a JDAL.⁸⁶ Under the law, JDAs are positions in a multi-service/multi-national command or activity involved with the integrated employment or support of the land, sea, and air forces of at least two of the three Military Departments. Such involvement includes, but is not limited to, matters related to national military strategy; joint doctrine and policy; strategic planning; strategic and contingency planning; and, command and control of combat operations under a unified command.⁸⁷ It

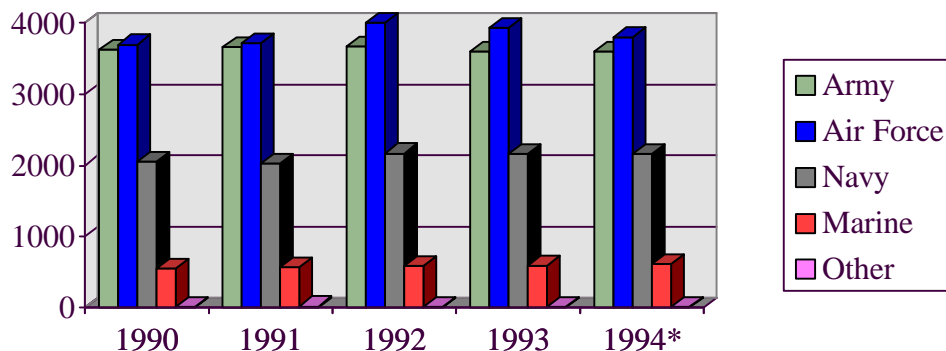
excludes assignments for training, joint education, or performance with in-Service positions.⁸⁸

Title IV requires 50 percent of all joint duty positions in grades above captain/Navy lieutenant be filled by officers who have been nominated or selected for the joint specialty.⁸⁹ Additionally, it directs SecDef to designate at least 1,000 critical joint duty assignments that must always be filled by fully qualified JSOs.⁹⁰ During initial implementation in 1987, SecDef designated over 8,000 JDA positions between the four Services, of which 1,000 were further designated as joint critical positions. Historically, the AF and the other Services have met the Congressional mandate to fill at least 50 percent of joint billets with JSOs or JSO nominees.⁹¹ In fact, with the transition waiver provisions offered by Congress, the Services were able to establish a large JSO pool from which to fill the 50 percent and critical requirements.

In addition to meeting the 50 percent fill requirement, AF has also met Title IV's requirement to fill all joint critical billets with JSOs. Again, this was possible because of the large transition JSO pool, in addition to another transition provision which allowed the Services to maintain an 80 percent fill rate for these billets until 1 January 1994.⁹² As stated in The Annual Report to Congress FY93, Appendix E, the AF exceeded the 80 percent requirement by an additional 6 percent.⁹³ Since 1 January 1994, the Service has met the 100 percent fill rate as required by the law for all critical billets.⁹⁴ At this point, it is important to note the AF personnel community took aggressive action to meet this Title IV mandate. Assignment officers were provided with specific written direction on procedures regarding assignment of JSOs to joint critical positions.⁹⁵ Of particular

note was establishment of a GO review prior to any assignment action involving joint critical positions.⁹⁶

While the AF has met the JDA and joint critical mandates, the compliance may become more difficult in the future due to the size and composition of the JDAL. First, in the past 5 years, the AF has undergone a massive draw-down and over 3,600 of the 5,300 JSOs designated in the transition period have separated from the Service. As of March 1995, the AF has only 1,790 JSOs; a 66 percent decrease in 5 years. This, coupled with the size of the JDAL, which has remained relatively constant as the military force has drawn down, is making it more difficult for the Services to maintain a sufficient quantity and quality of officers to meet both Service and joint requirements.⁹⁷ Figure 3 shows the size and composition of the JDAL by Service since 1990.⁹⁸ As indicated, the AF continues to maintain a larger portion of the joint billets in comparison to the other Services. Consequently, the impact of the draw-down may have an even greater effect on the AF since they have a larger share of the joint requirement.



Source: Joint Staff, J-1, MMD

Figure 3: JDAL Composition by Service

Next, we will examine the requirement for “all joint specialty officers and a high portion of other officers who graduate from a joint school to be assigned immediately to a joint duty position.”⁹⁹ Congress designated National Defense University (NDU), which includes National War College (NWC) and the Industrial College of the Armed Forces (ICAF), as Joint Professional Military Education (JPME) schools.¹⁰⁰ Armed Forces Staff College, also a part of NDU, was designated as the JPME Phase II school.¹⁰¹

The law directs JSOs graduating from all joint PME must go to a joint duty assignment immediately following graduation unless waived by SecDef.¹⁰² Additionally, SecDef must ensure better than 50 percent of the remaining graduates go to joint duty on their next assignment.¹⁰³ This portion of the law was amended in 1993 to read “. . . up to one-half of the required 50 percent of officers [needed] to fulfill the post-JPME requirements [can do so] during a second assignment following graduation.”¹⁰⁴ According to the AFMPC staff, the AF has not implemented this provision because of cumbersome tracking procedures.¹⁰⁵

In looking at AF compliance, we need to address two areas. First, whether AF has complied with the law, and secondly, whether there are potential problems in this area? In answer to the first issue, since 1988 the AF has met Title IV outplacement requirements with only minimal waivers. Of JSOs graduating from NWC and ICAF between CY88 and CY94, a SecDef waiver was only requested and received on five individuals to allow them to fill specific AF mission requirements. As for the 50 percent joint outplacement of non-JSO graduates, the AF met this requirement every year except 1990 when NWC outplacement missed the target by three individuals (18 of 41).¹⁰⁶

While the AF has enjoyed reasonable success at meeting Title IV mandates, it has not been without some difficulty. This brings us to our next issue, Acquisition officer attendance at ICAF. Because a significant portion of the ICAF curriculum addresses subjects essential to an advanced study in Acquisition, ICAF was selected as the location for the Senior Acquisition Course (SAC). As with other career fields, Acquisition officers take the same course; however, they tailor their electives, writing projects, and additional classes to the Acquisition area.¹⁰⁷ By placing SAC at ICAF, the same 50 percent joint outplacement requirement levied on the other career specialties also applies to the Acquisition force. If these individuals are exempt from joint outplacement to meet Service Acquisition demands, then a greater percentage of the other career fields must go joint. In an effort to balance the needs of the Acquisition community with other career fields, the AF established a process whereby ICAF Acquisition officer assignments are worked on a case-by-case basis.¹⁰⁸ While not the optimum solution, it does attempt to minimize the impact of conflicting legislation.

As an alternative solution, the Office of the Under Secretary of Defense, Acquisition and Technology, Acquisition, Education, Training and Career Development (OUSD (A&T)/AET & CD) has proposed a legislative change to Title 10, Chapter 38—Joint Officer Management, Section 663, to allow SecDef to “exclude from this provision military members of the Acquisition Corps, as defined in Section 1731 of this Code, who have graduated from the Senior Acquisition Course at the Industrial College of the Armed Forces if they are assigned to Critical Acquisition Positions . . . upon graduation.”¹⁰⁹ If adopted, it will give AF additional flexibility to assign Acquisition officers where they can best be utilized, without impacting outplacement requirements for other career fields.

In 1986, Title IV also mandated, subject to SecDef waiver, that joint duty tours be at least 3 years in length for G/FO and 3 1/2 years for other officers.¹¹⁰ This requirement was amended in 1988 to read, “at least 2 years for general and flag officers and at least 3 years in length for other officers.”¹¹¹ The only exceptions to the normal tours are: individuals, other than G/FOs, on their initial assignment in a COS; those electing retirement or separation; individuals relieved of duty ‘for cause’; or individuals with a qualifying reassignment.¹¹² In terms of compliance, the AF has exceeded the requirement, for according to The Annual Report to Congress, FY93, AF officers averaged 39.7 months in a joint billet.¹¹³

Let us now look at the exceptions in more detail. For COS, the SecDef identified selected career fields from within the combat arms specialties in the case of the Army, or equivalent specialties in the case of the Navy, Air Force, and Marine Corps. As codified in Title 10, Chapter 38, and outlined in DepSecDef’s letter, 22 August 1988, “Equivalent specialties are those engaged in [the] operational art to attain strategic goals in a theater of conflict through the design, organization and conduct of campaigns and major operations. In addition, specialties among those meeting this definition and which are experiencing severe shortages of trained officers must be designated as COS.”¹¹⁴ Specific restrictions apply to COS provisions, such as: it only applies to an officer’s initial joint duty assignment; officers must be nominated for the joint specialty prior to beginning the assignment; officers can be assigned without having completed JPME Phase I; limited adjustments to the average tour length can be made for COS officers (no more than 12 1/2 percent of all JDAs on the JDAL can be excluded in any year); a percentage of all critical billets are required to be filled by COS officers; and, COS provisions do not apply

to G/FOs. Within the AF, eligible career fields are: pilots, navigators, air weapons directors, missile operations, operations management, and space operations.¹¹⁵ Another exception to the 36-month tour requirement is for individuals given a qualifying reassignment including: reassignment from a JDA for hardship, medical, or humanitarian reasons; movement to another JDA immediately after promotion because a position equal to the new grade does not exist; or the officer's billet is deleted because of reorganization.¹¹⁶

The final area that needs to be addressed concerns the provision of law granting cumulative or constructive credit. Cumulative credit, “. . . is service in joint duty assignments which totals in length no less than the applicable standard prescribed in a joint duty assignment that was performed outside the United States or in Alaska or Hawaii; or was terminated because of a qualifying reassignment as mentioned earlier.” Unless it is a qualifying reassignment, cumulative credit may not be granted unless the member has served at least two years in the assignment.¹¹⁷ As an exception, the FY88 NDAA did allow cumulative credit for certain officers who had completed multiple joint tours for purposes of promotion to G/FO or for award of the joint specialty. To qualify, the member had to have served in two or more JDAs with a total of three or more years, which included at least one tour of duty in a JDA performed outside the United States or in Alaska or Hawaii, or was terminated because of a qualifying reassignment.¹¹⁸ Another exception to this policy was made for individuals who served in Operations DESERT SHIELD and DESERT STORM. Specifically, the FY93 NDAA included a provision for granting joint duty credit to officers in the Persian Gulf Combat Zone. This provision “. . . applies to any officer who after 1 August 1990, and before 1 October 1991 . . .

provided significant experience in joint matters or involved frequent professional interaction. . . .” with other Services or allied forces.¹¹⁹ The total of such joint assignments granted full credit under this policy may not exceed six percent of all JDA[s] at any time.¹²⁰ The AF conducted two separate boards to select officers for this joint duty credit, resulting in 114 officers receiving full credit and an additional 58 receiving partial credit.¹²¹

Constructive Credit is another provision of the law to enable the Service additional flexibility to reassign officers, who have not served the full joint duty tour, due to mission (Service) requirements. It can be granted to an officer, other than a G/FO, “. . . who, for reasons of military necessity, is reassigned from a joint duty assignment within 60 days of meeting the tour length. . . .”¹²² Up to 60 days of credit can be given to allow the officer to meet the minimum necessary for joint credit. This provision does not apply to an officer who has served less than 10 months in the JDA. This portion of the law was further clarified by DepSecDef Memorandum, 19 June 1989, “. . . for reasons of military necessity (e.g., school report date or a change of command that cannot be delayed) . . . granting of constructive credit shall be limited to those cases in which other alternatives will not suffice to meet mission requirements.”¹²³ This provision has allowed the AF increased flexibility in meeting key mission requirements while still meeting the intent of Title IV. Of particular importance, it permits AF to do this without unduly penalizing the Service member.¹²⁴

In addition to designating joint positions, determining JPME outplacement, and ensuring officers serve the mandated time in a joint billet, SecDef also has a responsibility to make sure joint training and Military Department assignments are excluded from JDA

consideration. There are provisions which allow for in-Service positions to be placed on the JDAL. First, Cross Departmental (CD) joint duty assignments are those where the officer serves full-time with another military department or with the armed forces of another nation. For the CD position to qualify as a JDA, the following provisions must be met: the position meets the definition of a JDA; the officer spends a significant amount of time involved in joint matters; the officer receives an official performance evaluation from the joint organization which becomes a permanent part of the officer's official personnel record; the officer is formally assigned to an authorized position outside of their own military department; and the position is documented on the JDAL as having been approved by SecDef.¹²⁵

The second in-Service category is the Dual Hat (DH) joint duty assignment, which requires an officer to have responsibilities to both a Service and joint, combined, or international organization. They can only be considered JDAs if the following provisions are met: the applicable joint, combined, or international organization is listed on the JDAL as approved by the SecDef; the officer spends a significant amount of time involved in joint duties in meeting his/her responsibility to the joint, combined, or international activity; the officer receives an official performance evaluation from the joint organization that is included in the officer's official personnel records; the officer is formally assigned to an authorized billet in the joint, combined, or international activity; and the position is documented on the JDAL as having been approved by SecDef.¹²⁶

Last, Jointly Manned Activities (JMA)s are organizations chartered by SecDef or CJCS as a JMA; have a single Service as executive agent; are a multi-department, multinational activity or element that performs a joint mission; reports operationally to a

unified or combined command or international organization; has a joint unit manning document managed by the executive agent, or multinational positions approved by JCS or SecDef; and positions within the JMA are distributed (normally not more than 60 percent for an single department) so Service responsibilities and influence appropriately reflect the mission assigned to the activity or element. Those individual billets which meet the definition of a JDA will be considered on a case-by-case basis for inclusion in the JDAL subject to the percentage limits for that organization, i.e., a JMA directly involved in joint planning or employment of joint forces is authorized to have up to 100 percent of its billets (major (O-4) and above) approved for JDA designation; a JMA which directly or indirectly supports joint forces are authorized to have no more than 50 percent of their major (O-4) and above billets as JDAs. This definition excludes those organizations, e.g., Service major commands, that are integral to a single military department as JMAs for joint assignment purposes.¹²⁷

In 1989, several issues surfaced regarding CD, DH and JMA positions, most concerned whether the AF had any billets which met the requirements, and whether the AF was willing to transfer those positions to the control of another Service or joint agency. A review of the MAJCOM positions revealed that 432 positions met the defined criteria, of which 38 positions in the Tactical Air Command were identified for transfer. These positions were located at North American Aerospace Defense Command, United States Central Command-Air Forces, United States Southern Command-Air Forces, and Air Forces Iceland. Because these positions would have to be relinquished to the control of other Services or joint agencies and the AF could possibly lose control of missions and

resources, e.g., Air Liaison Officers and Tactical Air Liaison Officers, the majority of these billets were never transferred.¹²⁸

The last provision of the law covered centers on the SecDef requirement “. . . to ensure that the qualifications of officers assigned to joint duty assignments are such that certain promotion rates will be achieved.”¹²⁹ Since promotion compliance was addressed in Chapter 4, this chapter looks at the actual assignment process to determine if high quality officers are being assigned to joint duties. Three areas will be addressed: the GO review prior to assignment to a JDA; the Washington DC Tour Review, and the Officer Volunteer Assignment System (OVAS).

As stated in Chapter 4, AF missed mandated promotion targets leading to changes in the assignment selection process for joint duty. One of the most significant changes was the GO review of officers assigned to joint duty. This was highlighted in the following statement in a 9 October 1991 SecAF Letter to the CJCS regarding AF promotions, “. . . all assignments to joint duty will be approved personally by the general officer responsible for directing assignments for the Air Force.”¹³⁰ This initiative was implemented in late 1991 as the result of AF’s failure to meet Title IV promotion comparisons for several consecutive boards. The assignment selection process incorporated an officer selection record assessment to determine joint suitability and a GO approval of the assignment action. In 1991, when this assignment process was approved, the AFMPC/DPMR was a GO and assumed responsibility for this review; however, once the AFMPC/DPMR position was downgraded to a colonel (O-6) billet, the reviews were staffed to the AFMPC Commander or Vice Commander for approval. In 1994, joint assignment approval for ‘good’ assessments, PME graduates, JSOs and extensions for

non-IPZ officers was delegated to AFMPC/DPMR. Approval for all other joint assignments was maintained at the GO level.¹³¹

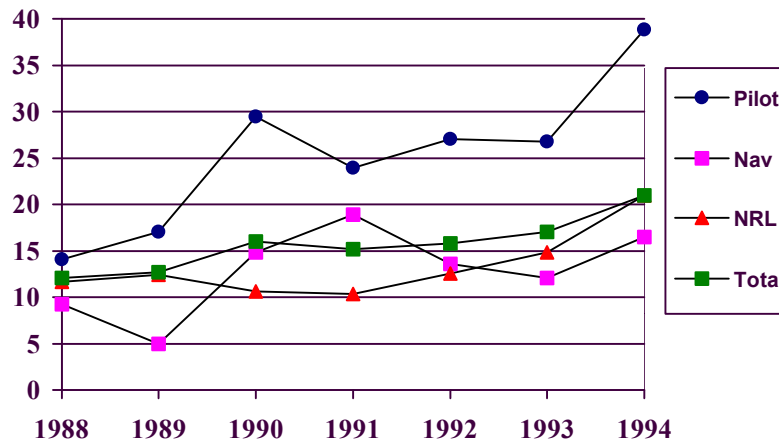
Although it may be premature to fully assess the long-term impact of this assignment selection review, there is sufficient data to support that AF has significantly improved the quality of those officers assigned to joint duty—quality measured by the increased number of BPZ and resident PME graduates assigned to joint duty, which should eventually lead to a higher quality JSO pool. This improvement may not be entirely the result of the GO review; however, it does appear that the review was definitely a contributing factor.

A review of the of BPZ pilot population entering joint duty from 1988 through 1994 shows that AF increased the number of BPZ pilots from a mere 14 percent in 1988, to 38.8 percent in 1994. The most significant increase occurred between 1993 and 1994, about two years after implementation of the GO review, when the rate of BPZ pilots spiked from 26.8 percent to 38.8—a 12 percent increase. Similar increases occurred for navigators and non-rated line officers; however, not at the same rapid pace. In 1988, only 9.2 percent of navigators and 11.6 percent of non-rated line officers assigned to joint duty were BPZ promotees, compared to 16.4 for navigators and 20.9 percent for non-rated line in 1994.¹³² Figure 4 clearly shows the increased numbers of BPZ officers entering joint duty from 1988-1994.

A similar increase exists for resident PME graduates outplaced to joint duty. An analysis of 1988 resident PME graduates shows that only 23 percent of ISS and 24 percent of SSS graduates were outplaced to joint duty. This compares to 31 and 42 percent for ISS and SSS, respectively, for 1994. However, what is interesting

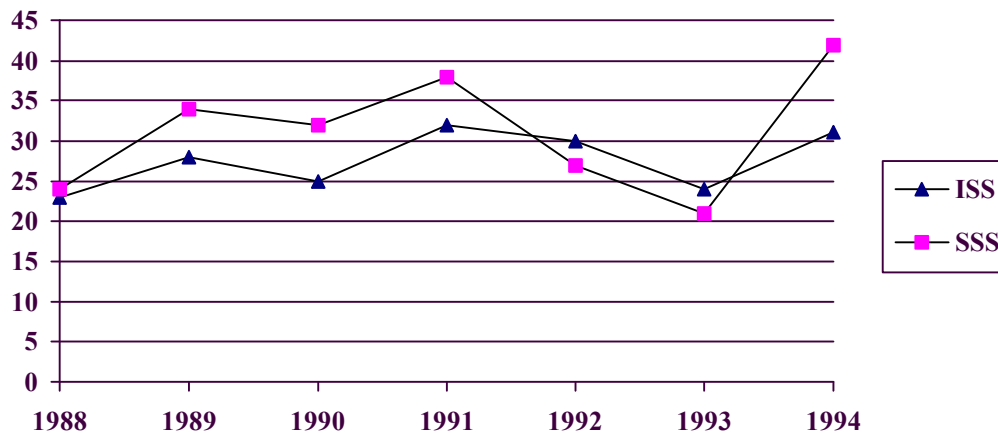
regarding PME outplacement is it was not a gradual improvement process. Each year there was a notable increase or decrease in officers outplaced to joint duty. The researchers could not isolate one specific factor which contributed to this cycle; however, there appears to be a correlation between AF loss numbers generated by voluntary and involuntary draw-down programs, which may have generated an increased availability of joint positions for resident PME graduates. The highest AF losses were noted in 1992; similarly there was a 34 percent increase in the number of officers entering joint duty for that same year. There was a significant increase in joint outplacement in 1991, followed by decreases in 1992 and 1993. As the great ‘influx’ of 1992 complete joint tours in 1994 and 1995, there should be a corresponding increase in PME outplacement. The 1994 data supports this assumption, because SSS outplacement doubled and ISS increased by six percent. It is too early to analyze 1995 data to determine whether it follows this trend. In analyzing this cycle, the reader should keep in mind there is lag time between graduation and assignment to a joint organization due to enroute training, e.g., AFSC. Figure 5 depicts PME outplacement data for 1988-1994.¹³³

As stated above, it is too early to assess the long-term impact of AF’s efforts to increase the quality of officers assigned to joint duty. However, in the view of the researchers, there appears to be some healthy trends, e.g., improved promotion statistics, to support that their efforts will have positive, long-term results. Unfortunately, it is difficult to isolate what specific initiatives have the greatest return, especially in a time of force draw-down and restructure. Last, it is very difficult, if not impossible, to measure the impact of leadership emphasis on joint officer management.



Source: AFMPC/DPMYAF

Figure 4: Percent BPZ Majors and Lieutenant Colonels Entering Joint



Source: AFMPC/DPMYAF

Figure 5: Percent PME Outplacement to Joint Assignments

Another area directly impacting the quality issue is centered on the amount of time an officer is assigned in the Washington DC area. Because of high quality AF officers serving in the Washington DC area, many are equally well qualified for joint billets at OSD, the Joint Staff, or the Air Force Secretariat level. Serving an extended period of time in one location led to an internal review “to monitor the total time in the Washington,

DC area and . . . ensure tour lengths are in the individual's and the Air Force's best interests."¹³⁴ Ultimately, the goal is to provide the best qualified officer with current Service experience to the joint arena. The process established AF/DP as review level for lieutenant colonels and below for tours beyond four years; and Vice CSAF level, for colonels tours beyond four years.¹³⁵ Although this specific review was not integrated into AF directives or instructions, AFI 36-2110 does address officers assigned in Washington DC by stating, "Not assign officers consecutively to the Washington DC area . . . without a 2 year intervening period outside the Washington DC area. . . ."¹³⁶ This restriction has the same over all effect as the Washington DC Tour Review.

The last area to be addressed in this section is the OVAS. In 1991, CSAF directed development of an improved officer assignment system for operational and mission support officers, which eventually incorporated the non-line. The new assignment system was based on the concept that there is a volunteer for every assignment. As with the previous assignment system, OVAS still considers an officer's qualifications, career goals, professional development and personal desires; however, the process for volunteering changed. Specifically, jobs are advertised worldwide via the Electronic Bulletin Board (EBB). The EBB allows an officer to view and voluntarily apply for positions for which they qualify. Once a position has been advertised for a specified time period (usually 30 days), the AFMPC assignment officers select the best match for the position. In cases where there are no volunteers, Service members with over 15 years of total active federal military service can be selected as non-volunteers to fill the positions. Some argue OVAS did not negatively impact joint assignments. Instead, with joint positions being advertised worldwide, it provided everybody an opportunity to volunteer.¹³⁷ Even though this may

be true, there has been a negative side to OVAS. Joint positions in hard to fill locations were left vacant or required members be selected based on time in service, not because they were necessarily the best qualified.

In January 1995, the new CSAF, General Ronald R. Fogleman, introduced changes to OVAS. Based on results from the Air Force Study Group, it was observed the basic tenants of OVAS were good “. . . particularly the EBB and the visibility it provides our members.” However, the Study Group observed that not as many people were actively looking for jobs for a variety of reasons, e.g., those in desirable locations did not want to leave, whereas those in bad locations could not find an assignment. As indicated by the following CSAF statement “This is contrary to our focus of accomplishing the AF mission and to the tenet of service above self.” The new Officer Assignment System (OAS) keeps the basic premise of OVAS; jobs will be advertised on the EBB and members can volunteer if they meet the qualifications. However, the following three changes were introduced: 1) establish an eligibility to move point, typically three years time on station; 2) stimulate command and officer career discussion; and, 3) select the most eligible, qualified officer (if a qualified volunteer is not found) rather than leave a position vacant.¹³⁸ For the purpose of this study, the full effect of the OAS changes cannot be determined; however, it appears they will have a positive effect in the AF’s ability to meet Title IV mandates.

This research shows the AF has complied with the assignment mandates of Title IV. This occurred as a result of many aggressive assignment initiatives designed to meet the intent of the law—to assign high quality officers to joint duty. As a result of these proactive management efforts, AF should increase their promotion compliance in future

years. There have been several assignment procedures and programs, which have affected the selection of the best qualified officer for joint duty. These initiatives should be closely monitored to ensure they do not adversely impact joint officer management. The following chapter will take an in-depth look at PME.

Chapter 6: Joint Professional Military Education

The overarching principle behind Joint Professional Military Education (JPME) selection for the AF is OPD. Under OPD, field grade officers work to enhance their performance in positions of greater responsibility. Those officers with the best performance and leadership potential compete for resident JPME. The AF selects the best-qualified officers from the promotion board order-of-merit to attend ISS and SSS.¹³⁹ Air Force Personnel experts strive to enhance joint officer quality and promotability by outplacing residence JPME graduates to joint assignments and sending officers with strong quality indicators to Phase II at AFSC.¹⁴⁰

Service specific education is Professional Military Education (PME). The Services have the responsibility to send officers with potential for advancement to in-resident PME to develop their strategic thought ability focusing primarily on their Service's mission. JPME is the part of PME which provides officers with an education in a broad range of joint areas to include: knowledge of joint military forces, joint warfare, and developing a sense of unity across Service lines.^{141 142}

This chapter focuses on the military education provisions of Title IV within the context of AF reform and PME. Specifically, it examines the personnel perspective of PME as a requirement to become a fully qualified JSO. Congress wanted to ensure PME produced a well-rounded warrior.¹⁴³ They wanted an officer “trained in, and oriented toward joint matters.” One intent of Congress was to develop an identification link between the Service officer and the Joint Officer to facilitate a better understanding,

acceptance of jointness, and to further strengthen joint elements of DoD.¹⁴⁴ The Law mandated DoD to revise curricula and institute standards at NDU Intermediate and Senior Service Schools with a focus on joint matters.¹⁴⁵ Title IV, Section 661, Management of Policies for Joint Specialty Officers, and Section 663, Education, contain the educational requirements for qualification as a JSO. They also mandate the requirements for the establishment and oversight of JPME programs. Title IV requires:

An officer who is nominated for the joint specialty may not be selected for the joint specialty until the officer successfully completes an appropriate program at a joint professional military education school.¹⁴⁶

Joint military education is an ever-evolving area. The 1986 law has been amended many times to strengthen the focus and requirements of JPME. Before discussing some of these changes, we need to examine the initial implementation of the law.

The House Armed Services Committee (HASC) Panel on Military Education, chaired by Representative Ike Skelton, reviewed implementation of the PME requirements of Title IV. It made recommendations for improving joint officer education. As of June 1991, the AF had taken positive action on 90 percent of the Panel's recommendations.¹⁴⁷ Many of the recommendations, including those not implemented, are beyond the scope of this paper. The key recommendations revolved around the framework of the PME system; the information taught, how it was presented, who presented the material, and when certain areas of instruction should be emphasized in an officer's career. The panel was the impetus behind establishment of a two Phase PME process for JSO qualification. All ISS/SSS students would attend the Phase I course, obtaining exposure to the joint world. Officers being assigned to joint billets would attend a Phase II course.¹⁴⁸

The CJCS Military Education Policy Document (MEPD) defines objectives and policies of the CJCS regarding military education for the Armed Forces, in accordance with the Goldwater-Nichols Act and its amendments. The document also establishes guidelines for the implementation of the law and the HASC recommendations. Included in this document are policies for joint education and requirements for JSO designation. CJCS Program for Joint Education (PJE) utilizes Service and JPME to provide the proper education for JSO development. To qualify as a JSO without a SecDef waiver, an officer must graduate from a JPME school. As mentioned in Chapter 5, JPME consists of programs at NDU, (NWC or ICAF) or a combination of Phase I (from an accredited PME program, e.g., Service resident, seminar, correspondence or equivalent) and Phase II (Armed Forces Staff College).^{149 150} Officers attending international schools, or courses of study or fellowships at other-than-PME institutions, may attend Phase II if the CJCS has designated the schools a Phase I equivalent or if they complete a Service Phase I program.¹⁵¹

The AF established milestones to assure provisions concerning PME Programs were implemented. The AF/DP PAD 87-1, 23 January 1987, evaluated PME designation procedures, ensuring they met the intentions of the law. In respect to PME, the PAD directed:

- The evaluation of current ISS/SSS programs regarding support of legislation

- Review current Colonel Joint PME Designation Board procedures to ensure they are consistent with intent of the law

- Review Lieutenant Colonel and below PME Designation Board procedures to ensure they are consistent with intent of the law

- The review of current Air Force PME programs

Review need to convert some or all PME resident programs to joint PME

Review AF PME programs to give curricula more joint emphasis and conform to common criteria established by the Military Education Coordinating Committee

Determine other Service support for AF PME initiative.

Procedures were amended and all of the above items were closed out by 23 January

1987.¹⁵² Today, Air Force Policy Directive (AFPD) 36-23, Military Education, and its accompanying instruction, AFI 36-2301, Professional Military Education, manage officer PME for the AF, ensuring programs comply with legislative and DoD requirements.

After the initial JDAL was approved in 1987, it was apparent to the AF and its Sister Services that the existing annual NDU output of officers was insufficient to support requirements. Multiple efforts, over several years, were made by Congress and DoD to smooth the transition and lessen the impact of the Goldwater-Nichols mandates. First, the SecDef implemented a ‘joint track’ program for Academic Year 88-89 in which graduates of the ‘joint track’ curriculum at Air Command and Staff (ACSC) and Air War College (AWC) met the educational requirements for award of the joint specialty.^{153 154 155} This action gave the AF its first pool of joint educated officers. In order to further enlarge the pool of JSO eligibles, effective August 1990, all ISS/SSS graduates (retroactive to 1985) received Phase I credit toward becoming a JSO.^{156 157} This change did come with the stipulation: “Officers who completed PJE Phase I before 1989 and who have not completed Phase II by 1 January 1994 will lose all PJE credit for the purpose of JSO designation.”¹⁵⁸ Even with this restriction, the grand-fathering of Phase I credit gave the AF some flexibility by increasing the number of officers eligible for JSO designation.

Despite the changes, the AF still experienced problems growing enough qualified people to meet their current and future joint requirements. This was due, in part, to the fact that NWC and ICAF quotas were limited and the alternate method to complete a full JPME program required graduation from a resident Phase I and Phase II program. The Joint Staff expressed concern that a large percent of AF Phase II students were ‘direct entry.’ The AF sent students to Phase II without the benefit of Phase I, so they could simply ‘fill the class seats.’¹⁵⁹ This impacted the production of potential JSOs, since (non-COS) officers are required to attend JPME, followed by a JDA, unless given a waiver by the SecDef. As stated in Chapter 3, these waivers are limited to 10 percent, by-grade, of the number of JSOs designated annually. Other Services experienced a smaller problem because of larger PME production and PME specialty mix, which more closely mirrored their joint duty requirements.

JPME production is also affected by the overall size and composition of the JDAL. On average, every six added JDAL positions places a demand for one additional JPME graduate per year. The Services are forced into very detailed personnel management to meet the JSO/JSO nominee JDAL fill requirements for approximately 37.5 percent of the list. This is the 50 percent JSO/JSO nominee requirement minus 12.5 percent COS exclusion, that must be filled by JPME graduates.

Since the Law’s implementation, AF assignment policies have emphasized joint duty for PME graduates and encouraged a high percentage of Phase I graduates going to joint duty assignments.¹⁶⁰ To meet its joint assignment requirements, the AF needs to send up to 50 percent of its Phase I graduates to Phase II and to joint duty tours.¹⁶¹ To enlarge the pool of Phase I graduates even further, the CJCS certified the AF’s non-resident ISS

program, making non-resident ISS Phase I graduates eligible to attend Phase II, effective January 1991.¹⁶² The number of JPME II students who do not have residence PME is of Congressional interest. It is one of the statistics provided by the SecDef in his Annual Report to Congress.¹⁶³ Table 2 provides the percent of AF officers who attended Phase II and did not complete residence Phase I for the last 4 years.¹⁶⁴

Table 2: Percent Attended Phase II Without In-residence Phase I PME

FY 91	FY 92	FY 93	FY 94
41	6	16	16

Source: HQ AFMPC/DPMRJ

The AF begins its residence school selection process with the major, lieutenant colonel and colonel promotion boards. Except for the period 11 September 1989 to 11 May 1992, which will be discussed later, candidacy for resident PME attendance is determined by the promotion board order-of-merit. Table 3 reflects the historic opportunity attendance rate for ISS and SSS.

Table 3: Officer Resident PME

School	ISS	SSS*
Phase Point	12.9 years	19.0 years
Grade	Major	Lt Col
Historic Opportunity Rate	13.6%-23.1%	10.2%-13.5%

Source: AFMPC/DPMYAF/DPMRPC1, AF/DPX Model

NOTE: Some colonels also attend SSS in-residence.

The historic opportunity rate is a function of year group size, and seats available, and window of opportunity (e.g., ISS, three year attendance window and SSS, four year attendance window). The ISS range reflects the loss of AFSC as an ISS PME. The 23.1 percent is prior to Academic Year 1990 (AY90) when AFSC was still an ISS. The 13.6 percent reflects post AY90 without AFSC.¹⁶⁵

All BPZ and the top IPZ major selectees are considered candidates for ISS. In CY90-92, the top 650 officers (all BPZ plus top IPZ) were designated ISS candidates. For FY93-94, the number designated as ISS candidates increased to the top 720 officers.¹⁶⁶ The top 300 lieutenant colonel selectees (all BPZ and top IPZ) are selected as SSS candidates, as well as all colonel BPZ selectees and the top 30 percent of the colonel IPZ selects (who meet eligibility requirements).¹⁶⁷ Candidates then compete for residence quotas at PME designation boards.

The eligibility window for ISS is three years beginning with an officer's selection to major. Attendance opportunity is approximately 18 percent (six percent of eligibles selected/year). In comparison, SSS has a four year window of eligibility upon selection for lieutenant colonel. Opportunity for attendance is approximately 16 percent (four percent of eligibles selected/year). A colonel or colonel select must have at least one BPZ promotion in a career and graduate with less than 23 years' Total Active Federal Commissioned Service.¹⁶⁸

The AF did have a short period, from 1989 to 1992, where, as an OPD initiative, PME designation was decoupled from the promotion board process. In June 1989, all promotion selectees to major and lieutenant colonel were eligible for residence PME with the MAJCOM or Management Level (ML) determining which officers were nominated to compete at annual designation boards. This decoupling allowed all officers to be nominated for residence based on current duty performance and commander involvement. The process eliminated reliance on promotion order-of-merit lists for PME eligibility. Additionally, it placed current performance as the key to whether an officer would go to PME—not the officer's performance at the time of the promotion board. To ensure

equity, the process grandfathered previously identified candidates, who were considered by separate transition boards for PME attendance.

The 11-22 September 1989 ISS designation board was the first board under the new process. Air Force limited the number of eligibles meeting the central designation board. They determined the ratio of the actual PME pool to total school slots. This ratio was divided into the actual eligible pool within each ML to determine the fair share quota. The quotas were given to the MLs along with its list of eligibles. Each ML was permitted to nominate its quota of top quality officers to meet the Central PME Board. The procedures did allow the ML to exceed its quota if the excess was justified.¹⁶⁹

The decoupled process did not ensure AF's top officers were selected for in-residence PME attendance. Instead, in-residence attendees were selected from the pool of officers nominated by their MAJCOM or ML. In some instances, officers were nominated because of availability rather than by outstanding qualifications. They may have been the best eligibles in their 'releasable pool' rather than the best eligible officers in their MAJCOM/ML.

The AF reverted back to the process of identifying candidates via promotion board order of merit with the CY91 Lieutenant Colonel Central Selection Board. A one time 'transition candidate recoupling board,' 11-22 May 1992, bridged the gap in candidacy selection. This transition board identified candidates from previous year groups who were IPZ and were not considered for school candidacy at that time. All BPZ selectees were automatically given candidacy.¹⁷⁰

The ML interface is critical in the current PME designation process since MLs nominate officers to the Central Selection Board for PME school designation. The

premise of the designation board is ML senior raters know which officers are at the right point in their career to attend PME in-residence. There is no quota limit on the number of eligible candidates the ML can nominate. Additionally, MLs can forward 'non-candidates' to be considered by the central selection board—five percent of the total number of candidates nominated.¹⁷¹ The Academic Year 1995 Board selected 31 of 64 non-candidates to attend ISS and 12 of 72 non-candidates to attend SSS.¹⁷² Senior Raters provide their recommendations via a board specific Officer Assignment Preference Worksheet, Air Force Form 90 (AF FM 90). This form is not a permanent part of an officer's record.¹⁷³ The PME specific AF FM 90 is a critical tool enabling the Senior Raters to comment on school selection and subsequent outplacement following graduation.

Annually, the AF conducts a Two-Phase PME selection board process at AFMPC. Phase I is the selection phase which mirrors the promotion selection process. Records are evaluated on a total person concept and scored on a 6 to 10 point range. Each board provides an order-of-merit listing to easily identify alternates should vacancies be created due to operational requirements. In the process, the board scores all records by eligibility year group to fill approximately 450 ISS and 200 SSS slots per year.¹⁷⁴ During Phase II, the selects are matched to a specific PME school or program, using the AF FM 90 and the guidance provided in the instructions to the board.

Guidance to the board members is provided by a briefing which covers the number of school quotas; nominee demographics, e.g., career field/rating, MAJCOMs, etc.; and Title IV. The board is charged to consider all available information on each nominee: quality of record; the officer's background/future utilization; senior rater/ML

recommendation; and officer's school preference.¹⁷⁵ The board considers the potential follow-on assignment which makes the best use of the selected school's education program. It makes selections based on what is in the best interest of the AF and the officer. Additionally, the board considers a school prepared 'template' to assist in designating the right officer to the right school. The board must take special consideration in school designation for officers who are JSOs. The major consideration is whether follow-on assignments should be within the AF or the joint world.¹⁷⁶ A recently completed review of the Officer PME Selection Board process by AFMPC strengthened the Designation Board by adding the "Personnel Community back into the designation process." The AFMPC representatives will focus the board on follow-on assignment considerations ensuring "an assignment-driven designation of all ISS/SSS selectees."¹⁷⁷ Increased emphasis on follow-on assignments ensures an officer's future utility is of primary concern during the school matching process.

Title IV is the prime consideration throughout the school selection process since all JSOs attending NDU schools must go joint, in addition to greater than 50 percent (50 percent plus 1) of the remaining class graduates. As such, the AF closely monitors selecting JSOs for NDU, especially if officers are coming out of joint tours or if they are rated officers needed in AF operational duties—to preserve their operational expertise and permit assignment to a leadership position.^{178 179} As stated above, the law required greater than 50 percent of non-JSOs to be outplaced into joint duty. Subsection (d) of Section 663 of 10 USC was modified by Section 933, "Flexibility For Required Post-Education Joint Duty Assignment," in the 1993 NDAA, to permit reassignment of NDU students to joint duty on either the first or subsequent assignment following graduation.¹⁸⁰ The AF

has not implemented this change due to the problem of tracking outplacements to ensure a joint assignment is made on the subsequent assignment. As of the writing of this paper, the Navy is the only Service which has implemented this authority.¹⁸¹

Armed Forces Staff College is the primary vehicle (80 percent) for meeting joint education requirements—it is also the prime limiting factor for JSO qualification. The majority of Phase II seats must go to future JSO eligibles in order to increase the number of eligibles for future JSO designation boards (See Chapter 3).¹⁸² The AF must maximize the scheduling of officers enroute to, or assigned to JDAs, or those with a high probability for future JDA.¹⁸³ As of 1994, the AFMPC, which schedules PME attendance, indicates that AF has had no problem filling its initial yearly AFSC quota and any additional quotas which are allocated. There are four classes annually with the total maximum number of DoD students (approximately 300 per class) limited by facilities at AFSC.¹⁸⁴ Table 4 provides the total AFSC fill rates for FYs 90-93 and CY94. It also provides the projected rates for CYs 95-96. The Service representation for each Phase II class is proportional to the number of Service billets on the JDAL. Services must also ensure a mix of specialties is scheduled to attend each class and non-resident Phase I graduates do not represent a disproportional share of the mix.¹⁸⁵

Table 4: Total AFSC Actual Fills

<i>Year</i>		<i>Intermediate</i>		<i>Senior</i>	<i>Total Active Duty</i>
FY	90	147	(5 wk)	42	189
	91	652		195	847
	92	663		163	826
	93	625	(12 wk)	130	755
CY	94	790		100	890
Proposed	95	702		*90	792
	Average	683		147	830
Possible	96	750		90	840

*expected annual throughput

Source: Joint Staff, J7¹⁸⁶

The Joint Officer Management Branch attempts to schedule AF officers for Phase II attendance while they are enroute to JDAs. Due to the limited schedule and number of quotas at AFSC, enroute attendance is not always feasible. Therefore, AFMPC makes every attempt to identify and schedule students requiring Phase II as soon as possible. Joint organizations are advised to ensure officers are released to attend the required course.¹⁸⁷ Although AF tries to support enroute attendance, it is not always possible to schedule a person for timely attendance at Phase II and still meet mission requirements. Per a spokesperson for the Joint Staff Military Education Division (J-7 (MED)), timely attendance at Phase II is only a guideline, which is not strictly enforced or tracked by JCS. The main concern is getting officers to Phase II.¹⁸⁸ Scheduling is also complicated by the fact that 15 percent of all JDAs are restricted to enroute AFSC attendance, and no temporary duty (TDY) and return from their JDA is permitted due to mission requirements or one deep positions.¹⁸⁹

Per a spokesperson at AFMPC, “Air Force seats for the Armed Forces Staff College have been cut to approximately 294 seats per year for CY94. This is the minimum essential number of seats we (AF) need to produce the JSOs we require.” The AF now schedules students for AFSC attendance by prioritization based on their potential to successfully meet a JSO designation board. Prioritization factors include, but are not limited to: future joint utility (based on JSO to critical billet ratio, by career field); factors which suggest an officer meets the criteria established by Goldwater-Nichols for JSO designation—at least the same overall quality as those officers assigned to the Service headquarters staff. For example, a large number of officers assigned to the Air Staff have attended resident PME, been promoted BPZ, or held commander billets. These officers would naturally have a higher potential to become a JSO, and therefore, have a higher priority to attend Phase II.¹⁹⁰

The Joint Officer Management Branch uses a matrix to aid in prioritizing officers for Phase II attendance, making the selection process very objective. In this process, overseas joint assignments have the highest priority for attendance (Appendix D). They recommend 60 percent of the available Phase II seats be given to high priority officers; residence PME graduates who are BPZ or are in high joint utilization specialties, e.g., Intelligence. The remainder of the quotas are filled by non-resident graduate officers who have a high probability to be assigned to a future JDA due to the large preponderance of their specialty on the JDAL. Officers who do not meet the criteria are carried as alternates to fill short-notice vacancies.¹⁹¹

Next, we will discuss current JPME shortcomings. First, not all PME students receive a full program of joint education (Phase I and II) due to AFSC seat limitations or

constrained opportunity to be assigned to a JDA. According to a briefing by the Deputy Director, Joint Staff for Military Education, concerning JPME restructuring, only 34 percent of all officers attend residence PME and only 44 percent of resident students receive Phase I and Phase II.¹⁹² Many challenges must be overcome. Legislation directs Phase II be taught for three months at AFSC. It even directs the student/Service ratio and the student /faculty ratio. As mentioned earlier, AFSC has a limited student capacity. The restriction on the size of the class, in conjunction with Congressional limitations, constrains the number of quotas available to the AF.

Balancing the unique requirements of the laws, providing the joint military education to the officer corps, and meeting Congressional mandates are challenges the Services must master. The Inspector General (IG), DoD, began evaluating JPME in FY92. They noted even though DoD and the Services have worked hard to implement Congressional mandates for JPME there are still areas for improvement. One recommendation, if implemented, concerning Phase II PME could assist AF in developing qualified JSOs.

The Phase II portion of the Joint Professional Military Education Program does not fully prepare students to perform their joint duty assignments from the outset of those assignments. The physical capacity of the Armed forces Staff College prevents students from attending the Phase II course before they arrive at their joint duty assignment. . . . We recommended that the DoD work with Congress to repeal the law that mandates intermediate Phase II Joint Professional Military Education be provided only at the Armed Forces Staff College so the Department can explore more effective alternatives to the current structure.¹⁹³

The CJCS JPME Review Panel also reviewed PME. Their three major recommendations could affect the entire process of JPME and resulting JSO qualification.

The military education architecture should provide objectives and standards for learning at all levels of PME (pre-commissioning, primary, intermediate, and senior) to improve and intensify joint learning throughout all officers' careers.

Certified resident PME should be designed to prepare officers for joint assignments upon graduation from an intermediate or senior PME institution and fulfill the educational requirements for JSO nomination.

Functional users (CINCs, the Services, the Joint Staff, Defense Agencies) should identify any specialized joint training required by PME graduates, which will then be provided through courses developed specifically to meet those requirements. In a broadening and deepening of its mission, the Armed Forces Staff College (AFSC) of the National Defense University should become a training and an educational institution. It should provide focused courses on a 'just-in-time' or as-needed basis rather than as a follow-on second phase to service PME. In addition, to set the standard for joint education, AFSC should explore the feasibility of developing other joint educational opportunities.¹⁹⁴

Both the IG report and the JCS JPME Panel Report require major policy and law changes. If their recommendations, as currently written, are implemented, they will affect the entire PME process and how AF grows a JSO. Armed Forces Staff College would no longer be a limiting factor in JSO qualification. These proposals echo past comments by the AF: A more flexible system is needed to produce fully qualified JSOs and still meet the needs of the Service.

Chapter 7: Compliance Discussion

In previous chapters, we mentioned other programs, policies, and laws which affect AF compliance with Goldwater-Nichols legislation. In this chapter, we will summarize these issues in a discussion format, while highlighting that Goldwater-Nichols legislation cannot be implemented in isolation—its impact is far-reaching, and can be found in almost every facet of officer personnel management. But first, an observation. Title IV was Congress' attempt to build a better quality joint officer force; however, this does not occur without expense to Service-specific organizations.

Historically, the Services have been reluctant to allocate their best to joint assignments because it redirects quality assets from Service operations. This is not an enlightened observation. When Congress initially drafted Title IV, military and civilian leadership in DoD were very resistant to providing input to Congress on how to achieve an improved joint officer force. This resistance could be interpreted as a delay tactic—if we ignore it will go away? The price of resistance was the enactment of very complex legislation directly impacting all future military operations with only limited input from the organizations most affected. Consequently, the Services have had to 'live with' the law and the piecemeal legislative attempts to make it right. In essence, it was the Service's underlying attitude regarding joint operations which served as the catalyst for joint legislation and also led to the creation of unrealistic and somewhat unwieldy legislation. In the view of the researchers, this same competition in priorities still exists today.

Now that we have set the stage, we will begin our discussion of ‘competing’ programs, policies and laws, which have adversely impacted AF compliance with this legislation. First, we will discuss the development of the JSO and those factors which have impacted the quality, education and assignment of that specialty. Secondly, we will discuss joint promotion issues which have evolved as a result of conflicts between Title IV and other pre-existing legislation. Last, we will address the assignment and JPME outplacement of the joint resource. In advance, we would like to re-emphasize that this chapter is a discussion of our personal observations and conclusions. Additionally, there may be other issues which have affected legislative compliance, which are either outside the scope of this paper, or have not surfaced during our research.

First, legislation directed the development of a super hero—the JSO. This officer walks and talks national military strategy; strategic contingency planning; and command and control of combat operations under unified command. It is obvious, Congress’ answer to deficient joint operations was the creation of a super hero trained and educated in joint matters, who possessed the same quality attributes as officers assigned to the Service headquarters. Congress was astute to ascertain since most Services assign their best to their headquarters, a quality promotion comparison for the joint specialty would be the Service headquarters rate. Unfortunately, this quality expectation may be unrealistic considering JSOs can be assigned in a multitude of organizations in positions of varying responsibility and importance, yet they are compared to officers in positions at the Services’ highest level of operations.

Nonetheless, this comparison was established by law and the AF has made a concerted effort to meet this promotion expectation. However, as mentioned in Chapters

3 and 4, the AF has consistently failed to meet the promotion objectives due to early JSO designation procedures, which were generated to respond to the law's mandate for the Services to develop an almost immediate JSO pool to meet the requirement to fill 50 percent of JDAL positions with JSO/JSO nominees. In effect, what led to promotion compliance failure was within the same piece of legislation. Since the Services did not have sufficient capability to generate JSO nominees by way of JPME, they were forced to rely on the transition JSO designation process to meet the law's assignment mandates. The AF based its projected JSO requirement analysis on a logical assumption they needed to designate enough transition JSOs until fully qualified JSOs were 'grown' via a complete program of JPME and a complete joint tour. Unfortunately, the AF over-designated in some career fields, and some designations were premature because they transpired too early in an officer's career to adequately assess whether there was long-term promotability. This occurred because the Title IV joint officer management concept was a 'bold stroke' in the way Services managed their officer corps—it was uncharted territory and the AF, along with the other Services, had to modify their entire assignment, promotion and education efforts to comply with the law. We are not implying there was a panic, for AF historical records show that Title IV implementation was systematic and orderly; however, we want to establish that AF was in a reactive vice proactive mode. In a relatively short time, they had to develop a comprehensive framework in which to make Title IV work.

A review of the historical records at AFMPC revealed that the transition era analyst projected AF would begin producing fully qualified JSOs in 1992. Our research found that AF has only produced 84 fully qualified JSOs during the post-transition era, although

a recently concluded designation board selected almost 200 officers for designation. These results have not been approved yet by SecDef. The number one limiting factor in JSO production, as pointed out in Chapter 6, has been JPME production capability. The limited AFSC quotas, coupled with an even smaller opportunity to attend a full JPME program at one of the NDU schools, form the crux of the problem. Shortly after AFSC became a Phase II top-off course, the annual production was reduced. This change was the result of legislation to increase the course length from 9 to 12 weeks.¹⁹⁵ Class seat allocations were further affected by student/faculty ratios, class and seminar mixes, and military mixes which were directed by the Skelton Panel. Interestingly, it would have been difficult for the Services to justify additional class seats, because during the 1991 to 1993 era, the Services did not fill all of the class seats.¹⁹⁶ This raises the question whether their under-utilization could have contributed to the reduction in JPME productivity.

The second issue affecting JSO production is the incongruity between the JDAL composition and resident PME attendees. As mentioned in Chapter 5, the JDAL is composed of primarily support career fields; approximately 70 percent. The two most dominant mission support career fields are Communications/Computers and Intelligence; they compose 13 and 12 percent, respectively, of the JDAL. This equates to 838 joint duty positions. Further, they have a combined total of 34 percent of the critical joint requirements.¹⁹⁷ However, when our researchers inventoried the Communications/Computers and Intelligence career fields composition for resident PME Academic Year 1995, they found there were only 46 Communications/Computers and 18 Intelligence officers at ISS. Further, there were only 36 Communications/Computers and 20 Intelligence officers at SSS.^{198 199} Since the ISS/SSS student career field representation

does not closely mirror the JDAL; fewer of those career fields attend JPME Phase II, AFSC, due to the prioritization scheduling process. Consequently, not enough of the ‘right’ career fields are passing through all the joint wickets to become a JSO. This results in a demand for quality joint officers which exceeds the available resource in both these career fields.²⁰⁰ One could assert that AF is not sending the right kinds of officers to resident PME; however, selection for resident PME programs is based on best qualified, much like promotions. That logic assumes the best qualified officers from the promotion order of merit are the right officers needed for joint duty and for senior leadership jobs.

As stated in Chapter 6, officers can obtain JPME Phase I through an accredited non-resident program; however, AFSC Phase II attendance is limited by class availability. Because of these limitations, AF schedules AFSC Phase II based on a prioritization process. Their number one priority is resident Phase I graduates, because of their high quality and promotion potential. Therefore, the composition of the AFSC class does not mirror the JDAL. Once again, the AF is forced to balance the quality expectations established by law, with the JDAL fill rate requirement, with the limited JPME capacity.

Since the implementation of Title IV, there have been numerous studies regarding legislative compliance and possible revisions to the law. The most current, and perhaps most comprehensive, is the recently concluded Joint Duty Assignment Study. What precipitated this study was the FY 93 NDAA, which directed the SecDef to conduct a study of JDA positions. Specifically, SecDef was directed to:

Assess the appropriateness of the current allocation of joint assignments and critical joint duty assignments, with such assessment to place particular emphasis on the allocations of joint duty positions to each Defense Agency; and to determine any changes in regulations that are necessary to ensure that the joint duty assignment process provides appropriate crediting as service in joint assignments in the case of officers assigned to Defense Agencies in positions that provide them with significant experience in joint matters;

assess whether officers who have the joint specialty . . . are being assigned to appropriate joint duty positions; and survey positions that provide military officers significant experience in joint matters but are now excluded from the joint duty designation under Section 661 of such title or other provisions of the law.²⁰¹

Accordingly, a comprehensive two year study was conducted by OSD, the Joint Staff, and the Services, with the assistance of RAND Corporation and the Logistics Management Institute (LMI). This study provided a much needed, in-depth look at joint duty issues and clearly confirms the JDAL process is flawed and requires corrective action. What is significant about this study is it is already generating much needed legislative and regulatory proposals regarding the number of joint critical positions; joint credit for in-Service positions; joint credit for Contingency Joint Task Forces Headquarters Staff positions; joint credit for captains (0-3); and reallocation of JDAs among joint organizations.²⁰² Our researchers are optimistic Congress will adopt some of the proposed changes to the law which should positively impact some of the associated issues involving JPME, JSO designations, and even promotions.

As pointed out earlier in this discussion, the diversion of quality personnel assets from Service requirements to joint organizations is a continuing issue. The writers of this paper agree this characteristic may be inherent of the Services—a necessary self-preservation. However, the law takes precedence over any inherent characteristic and the

Services must give their best to joint if they expect to meet the quality mandates specified in the law. The problem becomes how and when to fit all of the JSO requisites into an officer's career, without detriment to the officer, or their organization's mission. One issue which frequently surfaces is the release of an officer for JPME Phase II attendance, a crucial requirement for JSO designation. Because of mission requirements, organizations are frequently reluctant to release an officer for attendance. However, failure to attend in the appropriate sequence can adversely impact designation for the non-COS officer, since a sequence waiver is required, which is limited to 10 percent of the annual JSO production, by grade. As mentioned in Chapter 6, joint organizations can designate 15 percent of their positions for enroute JPME Phase II attendance. Unfortunately, due to limited class seats and mission requirements, officers are not always able to attend enroute and may lose the opportunity to attend. Again, this may affect their qualification for JSO designation.

Operational requirements affect more than the release for JPME. A good example is the AF fighter pilot shortage, which was created by training constraints and force losses. The AF needs fighter pilots in the blue suit; because the overall manning is 84 percent, of which, major (O-4) manning is 83 percent.²⁰³ At the same time, there are 171 fighter pilot positions on the JDAL; 58 are major positions.²⁰⁴ The AF needs an experienced fighter pilot force to train and lead its younger pilots. What becomes the priority—AF or joint? This shortage creates conflicting requirements which must be balanced, but at a price. Either the AF or the joint world must absorb the deficit, fair share the shortfall, or agree to substitute the requirement.

As mentioned earlier, a similar comparison can be drawn to the Intelligence career field, whose field grade force has been adversely affected by force draw-down programs. Their field grade manning is 73 percent, yet their combined major and lieutenant colonel joint requirement is 330 officers.²⁰⁵ To maintain acceptable manning levels, the career field must grade substitute approximately 300 company grade officers. The personnel management system is in the precarious position of balancing AF and joint requirements. If they do not send the right kinds and quality of officers to joint positions, they may jeopardize their ability to grow JSOs to fill critical billets or to contribute to the 50 percent fill rate requirement. If they send a greater portion to joint, Service operations may be adversely affected.

Time constraints seem to affect every aspect of joint officer management. In 1994, the average commissioned service tenure for a lieutenant colonel retiring from the AF was 20.9 years. For retiring colonels, the service tenure was 26.4 years. In that time span, an officer must develop depth and breadth of experience; acquire training in their career field; complete their professional military education requirements at each level, e.g., Squadron Officers School (SOS)/ISS/SSS/JPME II; perhaps acquire a Service sponsored advanced academic degree; fulfill command position(s); in addition to serving in a staff and/or joint position(s).

For those officers who achieve BPZ promotions, the available time to complete these milestones becomes compressed. It is unrealistic, and almost impossible, to meet all of the ‘wickets.’ We will discuss this further in our chapter on OPD; however, the present point is the AF has a defined career track for each AF Specialty Code or MWS, and within that system, they attempt to integrate joint education and assignments to meet the law’s

mandates to enhance joint operations. One of the greatest conflicts between AF OPD and joint officer management is within the time limitations of an officer's career; it becomes increasingly difficult to meet joint requirements while simultaneously meeting Service-specific professional development expectations, which are critical to promotability—a key element of the Goldwater-Nichols legislation. Let us now turn our attention to promotions.

The promotion expectations were established for the sole purpose of monitoring the quality of officers assigned to joint organizations in an attempt to improve the quality of the joint force. As shown in Chapter 4, AF has failed in many promotion categories since promotion tracking began, although there has been gradual improvement. The issue of whether to follow legislation which directs the selection of the best qualified for promotion or to promote joint at the price of best qualified was addressed. The AF has taken several actions to ensure the promotion selection process highlights the mandates of Title IV. These actions include strengthening the board charge, incorporating information regarding the importance of joint in the board membership briefing, and clearly identifying joint duty or JSO status on the officer's selection brief. Despite these aggressive actions, the AF still experiences difficulty in meeting the promotion expectations. In our view, best qualified must take priority, since the mandates of Title IV were expectations to ensure a quality joint officer force—the Congressional intent was not to direct promotions. The key to this is clearly stated in Title 10, “The Secretary of Defense shall ensure that the qualification of the officers **assigned** to joint duty assignments are . . .”²⁰⁶ This brings us to our next topic of discussion, assignments.

We have already addressed the size and composition of the JDAL and its ensuing problems affecting JPME. In this section regarding assignments, we will focus on the law's requirement directing the assignment of all JSOs and greater than 50 percent of non-JSOs to JDAs following NDU, and how this requirement conflicts with other legislation and OPD. Then we will divert our attention to four AF programs which have impacted the joint assignment arena: the OVAS; the GO joint duty assignment review; the Washington DC Tour Review; and the Air Staff-JDA Cross-flow initiative..

First, as stated above, the law's mandate to assign all JSOs and greater than 50 percent of non-JSOs graduating from NDU schools to joint duty can conflict with other legislation and what is best for the officer's professional development. We will first address an issue involving the Acquisition career field. The ICAF is the preferred SSS for senior Acquisition officers. Acquisition officers are not exempt from Title IV outplacement requirements. Yet the AF needs these quality officers in senior Acquisition positions to ensure they meet the mandates of Acquisition legislation. As such, each year for the past several years, Air Force Materiel Command (AFMC), which needs these assets, requests specific officers be exempt from outplacement into joint duty. AFMPC works closely with AFMC to ensure these officers are assigned to critical AF Acquisition billets. Unfortunately, as stated in Chapter 5, this results in higher percentage of non-Acquisition officers being assigned to joint duty. Another issue affecting outplacement is the number of officers in professional career fields, such as legal or medical, which have no joint requirements. Every 'professional' enrolled in ICAF or NWC is at the expense of another career field officer being directed to go joint.

Since all NDU JSO graduates must go joint, the AF closely scrutinizes each JSO they send to NDU. They must ensure a follow-on joint assignment is in the best interest of the officer, and AF operational requirements. As previously mentioned in Chapter 6, this requires the ‘hand-massage’ of school assignment selections to reduce Title IV conflict with OPD and operational requirements. The price is some officers may not be sent to the ‘right’ school so AF can ensure they go to the ‘right’ post-graduation assignment. Another impact of this law is that by mandating JSOs go to a JDA following graduation, they are effecting a move which may not be in the best interest of an officer’s promotability; once again, a very critical element of the Goldwater-Nichols legislation. We will now turn our attention to four AF assignment initiatives.

As mentioned in Chapter 5, the AF implemented the OVAS in 1991. Although this system has recently undergone modifications and is now the OAS, it is too early to assess those changes, so we will only address the effects of OVAS on joint assignments. There are two opposing thoughts on the impact of this program; the first is because joint assignments are advertised via an EBB, they are visible and encouraged, almost like an employment agency selling a job. The element of competitiveness has been introduced, because officers compete for the positions based on a ‘best match.’ Accordingly, the quality of those officers assigned to joint duty should be good. However, the second side of this issue is there are JDAs in some less than desirable locations and, with an assignment system based on volunteerism, there is not always a volunteer. The only exception built into this system was non-volunteers could be selected if the gaining organization was willing to accept a non-volunteer. However, non-volunteers could only

be selected for these assignments if they had 15 years of service. Consequently, rather than best match being the primary selection criteria, service tenure took precedence.

The assignment selection of AF officers for joint duty has been closely scrutinized by senior officers. As mentioned in Chapter 5, in 1991, AFMPC implemented a GO review process for all JDAs. This process incorporated a joint suitability assessment conducted by AFMPC promotions, followed by a GO review, which was originally conducted by the AFMPC/DPMR, until the position was downgraded to a colonel billet in 1992. The review was then staffed to the AFMPC Commander or Vice Commander for approval. In 1994, approval authority was again delegated by AF/DP to AFMPC/DPMR (Colonel billet) for officers with ‘good’ joint suitability appraisals, JSOs, non-IPZ extensions and officers graduating from a resident PME program. The supporting logic for this delegated authority was GOs were not as available as they were when the policy was initially established and that the new policy was “consistent with quality improvement, empowerment and accountability goals . . .”²⁰⁷

The next personnel management effort affecting the assignment process for joint officers was also mentioned in Chapter 5. This program was referred to as the Washington DC Tour Review. Although this management initiative was never formally integrated into regulations or instructions, it was implemented. In short, the process required lieutenant colonels and below with 4 years tenure in Washington DC, who were selected to extend in the DC area for a continuation of a current assignment or subsequent assignment, to undergo an AF/DP review before the assignment action was approved. The intent of the review was to ensure officers did not have excessive tenure in DC, possibly adversely affecting their OPD. Similar to this review, AFI 36-2110 also led to

close scrutiny of Washington DC assignments by requiring waivers of officers assigned consecutively to the Washington DC without a 2 year intervening period outside the Washington DC area.²⁰⁸

Our focus is not the propriety of this review, it is merely to show this process did affect joint officer management. Since the DC area is saturated with joint and non-joint field grade positions for career fields like Communications/Computers and Intelligence, there is a greater requirement to move these officers within the DC complex—not necessarily with adverse effects to OPD. Once this review process was implemented, there was some reluctance on the part of the affected officers, organizations, and even AFMPC assignment officers to pursue a review due to the high visibility of the process. The impact on joint officer management was the best officer for the position was not necessarily selected because their DC tenure would exceed 4 years.

The last assignment initiative which had the potential to have significant impact on joint duty assignments was referred to as the Air Staff-JDA Cross-flow. This little advertised effort was the suggestion of the AF/XO, who in December 1990, sent a memorandum to AF/DP stating, “We worked hard this past summer to identify talented back-fills for our projected vacancies, but were surprised by the fact that nearly all our top choices were tied up in nomination to joint billets. . . . It appears to us that we are losing in a competition with the joint staffs for our best personnel. . . . We should consider assigning some of our brightest majors and lieutenant colonels to the Air Staff and at the mid-tour point, work some of them to an area in the joint staffs for a couple of years.” The AF/XO saw this as ‘win-win’ proposal because officers could hone their staff skills in a shortened Air Staff tour in preparation for joint duties.²⁰⁹ The Joint Staff supported the

proposal; and welcomed the inclusion of Air Staff officers in assignment nomination packages; however, would not commit to COS-pull action at the two year point.²¹⁰

One could assert that the Cross-flow Program was Service parochialism in action since it was premised on the belief that the Joint Staff was getting the best personnel; however, for a rated officer serving a four year Pentagon tour, this initiative was an effective way to meet both Air Staff and Joint Staff career wickets in one assignment. Although its inception may have been Service-selfish, the Cross-flow Program was a good management initiative and could have paid big dividends for the officer, the Air Staff and the Joint Staff—had the program worked effectively. A review of the AFMPC Cross-flow files showed that no more than a handful of officers were cross-flowed from the Air Staff to the Joint Staff each year.²¹¹ Eventually, the program died.

In summary, the mandates within Goldwater-Nichols legislation created compliance difficulties due to the inter-relationship of the promotions, assignments, education, and JSO designation requirements. For example, the law mandated an almost immediate JSO/JSO nominee pool, with ‘fill’ rates and promotion expectations, without the JPME production capability. Next, the JSO is an AF member who must follow a certain career path to remain competitive for promotion which is a critical component of the Title IV legislation. This career path is saturated with training, education, career expectations, and leadership opportunities that may conflict with the career course for a joint officer. In essence, there are not two separate career tracks for this officer; he or she must carefully manage their Service and joint requirements despite limited time constraints and conflicts mentioned in our previous discussion. Last, other legislation directing promotions and assignments does affect AF’s ability to meet the mandates of Title IV. The bottom line:

Title IV does not exist in a vacuum and is vulnerable to the effects of other policies, programs and laws.

Chapter 8: Title IV and Officer Professional Development (OPD)

In our previous seven chapters, we identified the joint officer management aspects of Goldwater-Nichols legislation which impact lieutenant colonels and below. We outlined the legislative requirements, completed a compliance review of the JSO designation process, and the promotion, assignment and education mandates for joint officers; after which, we presented a discussion of the policies, programs and laws impacting AF compliance. We will now shift our focus to study how AF has integrated Goldwater-Nichols mandates into their OPD program, and the impact of this legislation on the AF officer. Career Guidelines were briefly discussed as they pertain to the JSO in Chapter 3; however, this chapter expands the discussion to evaluate the Service's attempt to integrate joint throughout an AF officer's professional development. First, we will provide some background on the AF OPD program, outlining its philosophy and key pillars—assignments, education and training. We will then analyze how well AF has implemented those concepts and how congruent their effort is with the joint officer management mandates established by Goldwater-Nichols legislation. We will end this chapter with a discussion of the recently concluded JDAL study, which has generated proposed legislation which should enhance Air Force's flexibility to effectively manage its officer force's professional development.

As mentioned in Chapter 3, in 1989, AF published AFP 36-13. In the foreword, General Larry D. Welch, then CSAF, commented regarding OPD, “. . . to some, the term has already become a catch phrase, while others are concerned that it is a program for

massive and mysterious changes to officer personnel management. It is neither. It is, instead, a redirection in the continuous process of building the professional competence of all Air Force officers.” General Welch further stated, “The Air Force leadership and the individual officer have a common interest—ensuring that every officer has the maximum opportunity to grow in professional competence . . .” and “There is no single or best path.”²¹² What precipitated publishing this pamphlet and General Welch’s comments was for years, AF officers were preoccupied with filling squares in preparation for future advancement. Senior leadership had become increasingly concerned there was too much emphasis on future assignments rather than current job performance. Consequently, AF leadership launched an effort to educate and guide officers on the proper professional development priorities. Under auspices of OPD, an officer must develop both depth and breadth of experience. Depth in the primary specialty knowledge and skills should come first, followed by breadth of experience, i.e., expansion of knowledge and experience in other areas. Under this program, job performance became the overriding key to advancement in the AF.²¹³

In implementing new OPD concepts, AF concentrated on three areas: the assignment process, education and training, and promotions. Within these areas, policies and procedures were formalized in a logical process encompassing the entire personnel spectrum. First, several areas of the assignment process were affected by this new OPD concept. The commander or supervisor formally became involved throughout the entire assignment process, beginning with the completion of the AF FM 90. This worksheet was designed to concentrate on the officer’s next assignment or PME attendance; it became the vehicle to provide the commander’s or supervisor’s recommendation to the personnel

system. During this process, the officer received commander or supervisor recommendations regarding the type and level of the next assignment, providing the officer the benefit of their professional experience and knowledge, in addition to their valuable assessment regarding the officer's qualifications and potential. The intent of the AF FM 90 was to develop a realistic assignment plan, which was a blend of the officer's assignment desires, with a viable assessment and recommendation from the commander or supervisor.²¹⁴

In this assignment process, officers were to be counseled about any assignment which might impact the officer's OPD, for example a join spouse assignment which may not be the best career option.²¹⁵ This new OPD process gave 'new life' to officers deferred to lieutenant colonel—they were deemed as viable resources, who possessed valuable skills and experience for future assignments.²¹⁶ Further, to re-focus young officers on the importance of obtaining depth in one's specialty, high visibility assignment such as Air Staff Training tours were eliminated in this new system.²¹⁷ Also, officers with twelve months of active duty service commitment could no longer decline an assignment and separate from the Service, an indication the AF was now holding officers responsible for their commitment.²¹⁸

Two very critical elements of OPD and preparation for senior leadership, education and training, were seen as key to a successful OPD effort. As mentioned in Chapter 6, the selection for PME was decoupled from the promotion process in 1989. Under the decoupled process, Management Levels became more involved in school selections by making officers available to meet PME selection boards via the AF FM 90. Also, the commissioned service time when an officer became eligible for SOS was increased from

two to four years to ensure officers received the appropriate education for their grade and experience. At the same time, the course length was reduced to enable more officers an opportunity to attend resident SOS. In the area of advanced academic degrees, the emphasis was directed at ensuring advanced degrees were acquired at the optimum time.²¹⁹

In the promotions arena, the AF transitioned from conducting two annual captain promotion boards to one. This change was consistent with central boards to other grades and stabilized promotions to captain. Also, officers promoted to captain received a one year active duty service commitment, which served two purposes; first, officers committed earlier to their profession, and second, the AF was better able to project their force structure. In addition, the number of BPZ considerations to major was changed from three to two, since the three BPZ considerations fostered careerism and did not provide adequate depth development.²²⁰

So how does joint duty and education fit into OPD? Joint requirements are driven by law; OPD by AF policy. As stated numerous times in this paper, the law has been modified to increase Service flexibility in managing their officer corps. Despite multiple amendments to the law, the issue of how to integrate AF OPD into the development of joint officers, **or** better said, can AF OPD be merged into joint, has never been adequately resolved

One of the first priorities for better integration of joint assignments, training and education is to impress upon the officer force the importance of joint, and the role it plays in their future professional development. The AF is currently revising the Officer Professional Development Guide, which will be published as AFP 36-2630. The

researchers reviewed the draft guide and found it incorporates career paths for each utilization field which “. . . provides general paths and time frames for development of officers among the various education and training options and assignment levels in the AF and the DoD to ensure a professionally balanced and experienced officer force.”²²¹ The guide does not address assignments to joint duties as a separate entity, instead it integrates joint duty as an assignment option throughout various officer career paths. Additionally, the new guide will be very different from the 1 March 1989 AFP 36-13, for it does not dedicate specific chapters to OPD, PME and Advanced Academic Degrees, the Officer Evaluation System (OES), the Officer Promotion System or the Assignment System.

The above personnel programs, and more, will be covered in AFI 36-2611, which is being currently being written. According the AFMPC office of primary responsibility, the OES and the OAS chapters are undergoing major modifications based on recommendations from an Air Force study group. These modifications have resulted in a complete re-write of OPD publications. In AFI 36-2611, there will be a chapter dedicated to Career Broadening and Joint Departmental Assignments; however, at this juncture, it appears it will closely mirror the March 1989 Officer Professional Development Guide.²²² As indicated earlier, reference to joint duty and PME in this previous OPD publication was scant.

As mentioned above, the draft AFP 36-2630 provides a career path framework for each career field. The guide clearly states that the paths are not definitive, nor are they squares to be filled to attain promotion.²²³ In some areas, the rated and mission support paths differ in their presentation of joint duty. The rated paths frequently mention staff experience is important and “joint combat operations are the key to success in battle and

demand the best officers to provide Air Force expertise in the joint arena.”²²⁴ The guide stresses that joint duty is required to become a JSO; however, what the joint specialty is and how it serves as a utility identifier is never defined. Joint duty is recommended early in a field grade career for both rated and mission support personnel.²²⁵ This is shown by the statement “so they do not limit their options when they make colonel.”²²⁶ Several of the mission support career fields mention that, “Air Force should send its brightest and best officers to joint to ensure the Air Force is well represented in this critical area.”²²⁷ The Intelligence career field which has a significant joint presence does briefly mention JPME and the JSO Designation Board. Unfortunately, as stated above, there was no information regarding what is the joint specialty and how it impacts OPD.

What is the draft OPD guide missing? First, it assumes the reader understands joint education and assignments. Nowhere in the guide is there an explanation as to why joint is important except to say it is a requisite for promotion to GO and it is key to the AF’s war-fighting capability. Although the reference to joint duty is well integrated throughout the guide, its presentation breeds a ‘square-filling’ mentality. The researchers understand that this guide is only one aspect of OPD education; however, at the unit level, it may be the only OPD publication a young officer may read. Hopefully, unit commanders possess a thorough understanding of joint education and assignments and can breach the information gap, since they “have the responsibility to guide and counsel officers on their careers.”²²⁸

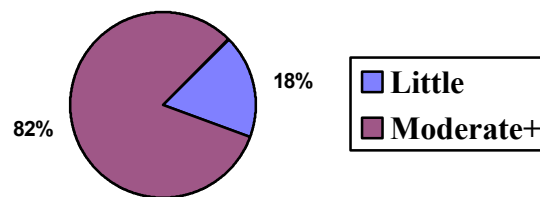
Last, as was mentioned in Chapter 3, there are no specific career guidelines for the JSO in this pamphlet or any other Service publications reviewed by the researchers. If the intent of Goldwater-Nichols was to provide specific career guidelines for the JSO, then the

AF has failed. Even if Congressional intent was to provide AF officers specific guidance defining the joint specialty and its prerequisites, and how it fits into an officer's professional development, there does not appear to be any significant information to this effect in any OPD publications. A more thorough coverage in the AF OPD program could dispel misconceptions regarding the subject legislation and the benefits of joint duty. Unfortunately, as joint duty is currently presented, i.e., on the officer selection brief, as a requisite for promotion to GO, as a staff duty option, it promotes square-filling. This next section will address AF officers' perceptions of joint duty.

Our researchers conducted a survey of AY95 ACSC and AWC AF students, and AFMPC assignment officers regarding their perceptions of OPD and joint duty.²²⁹ Sample surveys are attached at Appendices E1, F1, and G. Students and assignment officers were asked questions regarding their perception of the importance of joint duty; whether they would recommend joint duty when conducting OPD counseling; what is the 'feedback' from their career field concerning joint duty; and whether they had received training on OPD concepts. Resident PME students were surveyed because they have a high probability of being assigned to joint duty and/or supervisory positions following graduation. Assignment officers were surveyed because they routinely interface with officers in both joint and non-joint positions, and they frequently conduct career counseling. They are probably in the best position to 'pulse' the perception of AF officers regarding OPD and joint. First, we will address the student survey results.

The student survey results indicate 78 percent of ACSC and 70 percent of AWC student respondents perceive joint duty as of 'moderate' to 'great importance' to their career fields. Although at first glance this appears to be very positive, it could be

significant when analyzed from the perspective of ‘war-fighters’ (rated) and ‘non-war-fighters’ (non-rated). According to the surveys, 22 percent of AWC war-fighters and 16 percent of ACSC war-fighters, for a combined 18 percent, perceive joint duty as having ‘little importance’ to their career field. This ‘little importance’ may be significant in that Title IV focus is joint war-fighting and these war-fighters have been submerged in a very joint intense curriculum, yet their perceptions of importance of joint duty appear incongruent. Figure 6 summarizes the AWC and ACSC war-fighters’ perceptions of the importance of joint duty.



Source: AFMPC/DPMYAF

Figure 6: Importance of JT Duty to AWC & ACSC War-Fighters

Another interesting finding was 57 percent of the combined ACSC and AWC respondents would ‘often’ to ‘always’ recommend joint duty when conducting OPD counseling, whereas 43 percent would only ‘sometimes’ recommend joint duty. Considering the resident PME population is the target pool for command and joint duty, this may be significant. However, it was also noted in the attached comments at Appendices E2 and F2 that a few of the rated officers qualified this response with statements like, “Depends on their career goals,” “If they are a high caliber,” and “Unless one is determined to be a GO.” Nonetheless, when coupled with the perception as having

‘little importance’ to their career field, this may be an indication they do not perceive joint duty as important as it is.

Another interesting response was to the question referencing the students’ perceptions of “feedback from those in your career field regarding JDAs.” Interestingly, 78 percent of the combined ACSC and AWC (rated/non-rated) respondents reported ‘favorable’ or ‘very favorable’ feedback considering joint duty from other officers in their career field, denoting that 22 percent reported ‘unfavorable’ feedback. This appears to support a belief that joint duty is not always viewed in a positive light. Figure 7 highlights the ACSC and AWC respondents’ perceptions regarding feedback from their career field regarding joint duty.

Last, the response to the question regarding whether respondents received training regarding OPD showed only 54 percent of the combined ACSC and AWC (rated/non-rated) respondents received training in the OPD elements. This is of great concern because these officers have a high probability of being assigned to key leadership positions, where they should be conducting OPD counseling and promoting joint concepts. Figures 8 and 9 summarize the survey results for the OPD training question.

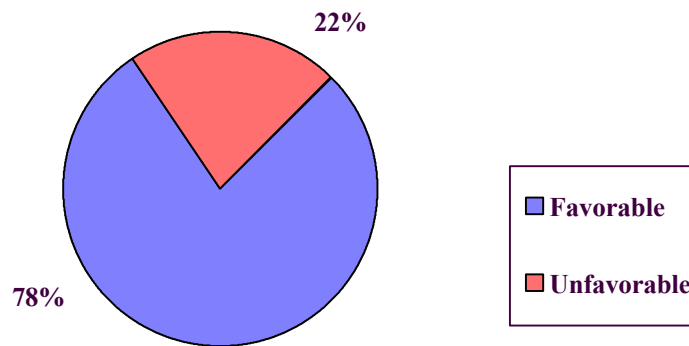


Figure 7: Career Field's Perception Regarding Joint Duty

As mentioned earlier, surveys were administered to AFMPC assignment officers. Similar questions were asked regarding perceptions of joint duty and OPD familiarity. However, an additional question was added to gauge their perception of how well informed the officer corps is regarding joint duty. First, 73 percent of the assignment officers report having been trained on the principles of OPD, in contrast to only 54 percent of student respondents. Although this is a vast increase over student reports, OPD familiarity should be the foundation of an assignment officer's repertoire, since they spend countless hours providing career counseling. Consequently, 100 percent would have been the desired response.

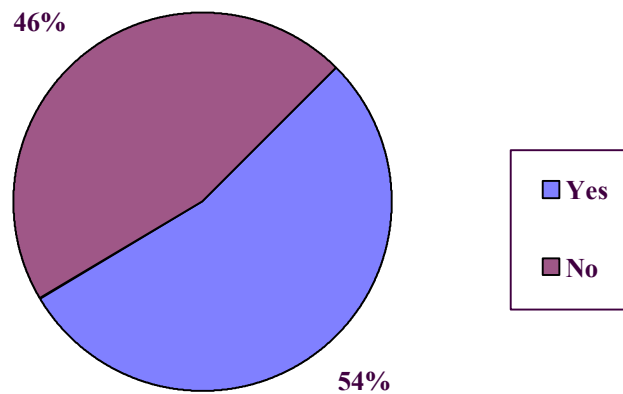


Figure 8: Percent ACSC/AWC Students OPD Trained

The next figure reflects the Assignment Officers' feedback on OPD training.

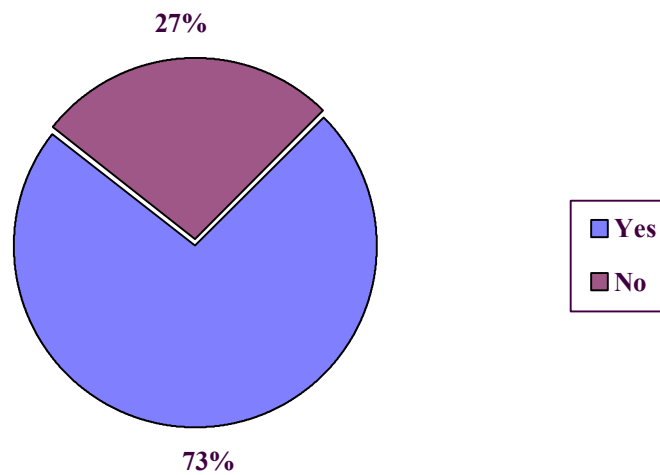


Figure 9: Percent AFMPC Assignment Officer's OPD Trained

The researcher also compared the student and assignment officer responses to the question soliciting their perception of the importance of joint duty. The surveys indicated 86 percent of the assignment officers viewed joint duty as of 'moderate' to 'great importance,' compared to 76 percent of the combined ACSC/AWC students surveyed. All assignment officer respondents reporting 'little' importance, also report having less

than 10 percent of their positions designated as joint duty; therefore, it would be logical for them to place less value on joint duty.

Eighty-one percent of the assignment officers report ‘always’ or ‘often’ recommending joint duty when career counseling, compared to 57 percent for the students. This could be indicative of one of two circumstances. First, on a positive note, assignment officers may have a greater awareness of the importance of joint duty in OPD; therefore, they promote it when conducting counseling. The second interpretation could be they are less discriminating when recommending joint duty; either, because they do not have ‘first hand’ knowledge of an officer’s performance or potential, or secondly, because their job is to fill vacancies in an assignment system based on volunteerism.

Probably one of the more significant findings is the response to the additional question about ‘information level.’ Forty-one percent of the assignment officers report officers they service have a ‘low’ knowledge level regarding joint assignments—57 percent report ‘medium’ and only one assignment officer reported ‘high.’ Figure 10 depicts the assignment officers’ perceptions of the ‘joint’ knowledge level of officers they service.

In summary, when comparing the student responses to those of the assignment officers, it appears assignment officers view joint duty in a more positive light; most likely, because they have been educated and ‘sensitized’ on the importance of joint assignments. The next section focuses on the promotability of the joint officer.

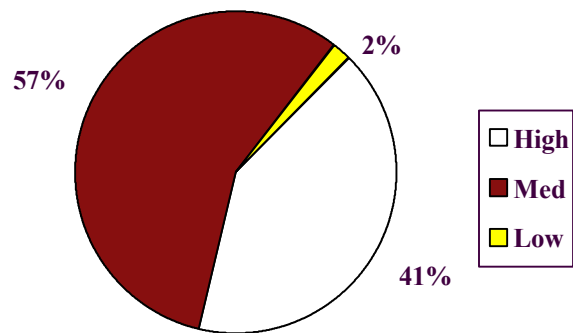
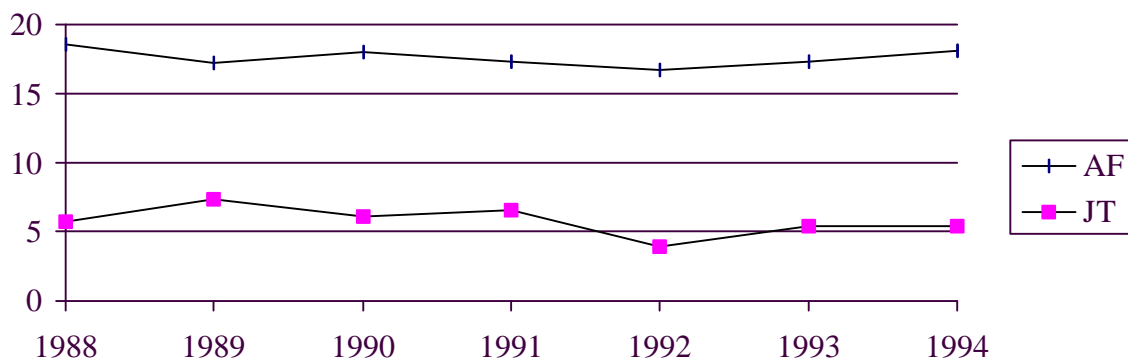


Figure 10: Assignment Officer Perception; Joint Knowledge Level

In Title IV legislation, Congress determined that one of the true measures of merit in the development of the joint officer is promotion results. There is a significant relationship between promotions and OPD, because if an officer does not develop professionally, their chances of promotion are reduced—if not eliminated. A summary of the promotion comparison results is located in Table 1 of Chapter 4. However, there are several other quality indicators, relative to promotions, which should also be considered. The first involves the number of deferred officers in the JSO pool and in joint duty assignments.

An AFMPC analysis of the JSO pool showed the deferred population soared from 1 percent in 1988 to a high of 26 percent in 1993. This may seem like a substantial increase; however, it is not significantly higher than the non-joint deferred officer inventory. In 1988, 23 percent of the non-joint majors and lieutenant colonels were deferred for promotion. The percent of deferred non-joint officers remained around 21 percent, until 1993, when it increased to 24.3 percent—still a percent lower than the deferred JSO pool for the same time. None of this may appear significant; until one considers that the JSO pool should be the same quality as the Service headquarters, not the AF average.

The second population should be analyzed is the number of deferred officers in joint duty. This category can be considered in two different ways—officers deferred within a year of entering a JDA, or by considering the entire population of deferred officers assigned to JDAs. We will consider both. First, the number of officers deferred within the first year of entering a JDA is relatively small as it should be. In 1988, 5.7 percent of majors and lieutenant colonels entering joint duty were deferred within one year of assignment. This percent decreases to 3.9 percent in 1992, which also is the same year AF sent its greatest influx of officers to joint duty. In 1993 and 1994, 5.4 percent of majors and lieutenant colonels entering joint were deferred for promotion within one year of assignment. What is important about this occurrence is that it is significantly lower than the percent of officers going to AF assignments during the same period. In Figure 11, we compare those officers entering joint duty to those officers entering an AF assignment during 1988-1994. Officers with separation or retirement dates have been extracted from the comparisons.



Source: AFMPC/DPMYAF

Figure 11: Officers Deferred Within First Year of Assignment

An analysis of the entire population of majors and lieutenant colonels assigned to joint duty shows the percent of deferred officers assigned from 1989 to 1994 has decreased. Deferred rates for pilots, navigators and non-rated line were at their highest during the 1989 to 1991 period, prior to the stringent assignment practices implemented in 1992. The most significant decrease was for pilots. In 1989, 13.3 percent of all major and lieutenant colonel pilots serving in joint duty were deferred, compared to 5.7 percent for 1994. For the same period, deferred rates dropped from 14.2 to 11.6 percent for navigators and 13.3 to 10.2 percent for non-rated line officers. Although 1992 and 1993 deferred rates are lower in some categories, these two years were affected by the AF's draw-down program, which only retained AF's more competitive officers. Accordingly, the 1994 data may provide a more accurate assessment of deferred rates. The point is the quality of the pool of officers assigned to joint duty has increased as indicated by the decreased number of deferred officers in joint assignments.

Another indicator of quality in joint duty is the number of BPZ officers assigned to joint duty or designated as JSOs. As stated in Chapter 5, the number of BPZ officers entering joint assignments has increased. For example, between 1988 and 1994, the number of BPZ pilots going to joint duty grew from 14 to 38.8 percent. As mentioned in Chapter 3, a similar increase was noted for JSOs designated after the transition period—68 percent of those JSOs selected by the 1995 JSO Designation Board had one or more BPZ promotions, compared to 39 percent in 1988.

When analyzing these measures of merit regarding quality of the joint officers, it appears the AF has made great strides in improving the quality of this critical force as evidenced by decreases in deferred for promotion numbers and increases in BPZ rates.

Much of this effort is the result of aggressive management actions to assign high quality officers to the joint world. Unfortunately, as mentioned throughout this paper, the AF has been plagued by early designation and assignment actions, which have had long-term effects on their ability to meet promotion objectives. As the transition JSO pool attrites and officers who acquired joint assignments and education during the post-transition period become tomorrow's JSO resource, the promotion rates should improve.

Further, as AF officers realize how beneficial joint experience is in terms of professional development and career advancement, the joint world will be seen as a more attractive job market. Although these benefits are undeniable, it is difficult to change perceptions which have been in-place for decades. We will now turn our discussion to a recent study which may have a significant impact on future joint officer management.

As mentioned in Chapter 7, the FY93 NDAA directed SecDef to conduct a study of JDAs. Those results, along with legislative recommendations, were to be reported to Congress by 15 April 1993; however, due to the complexity of the issues, which required in-depth study and analysis, the Services provided interim responses, until the full magnitude of the issues could be determined and appropriate legislative recommendations made.²³⁰

In this effort, the DoD JDAL Study Group made several findings warranting corrective action, all of which impact OPD to some degree. Their findings revealed:

1. there are positions on the current JDAL that do not provide a significant joint experience, and there are positions **not** on the JDAL which provide significant joint experience;
2. the critical JDA requirement is less than the 1,000 positions mandated in law;

3. there are positions in Defense Agencies which provide less joint experience than positions in OSD, Joint staffs, and Unified Commands;
4. a significant number of JSOs are being returned to both critical and non-critical joint duties, although the law permits the use of JSO nominees to meet the 50 percent fill rates;
5. there are in-Service positions which provide significant joint experience; and
6. there are captain (O-3) positions that show significant joint content.²³¹

Changes to the Joint Officer Management System based on the above results will impact the AF's future management of joint officers.

As stated above, all of these findings to some degree impact OPD. Rather than discuss the impact of each separate finding on OPD, we will reduce the issues to two main points due to their inter-relationship. The first obvious observation is because of a flawed JDAL, the right officers may not be receiving joint credit despite their significant experience in joint matters (Findings 1, 3, 5, and 6). As the result of this accounting error, an officer may receive a subsequent assignment to a JDA to receive joint duty credit or the officer may not earn the JSO designation, despite his/her joint experience. Both of these consequences could adversely impact OPD and future utilization. Secondly, the magical 1,000 critical billet target has become increasingly harder to fill with JSOs in times of a major force draw-down (Findings 2 and 4). A more conservative number would increase the Services' flexibility to assign JSOs where they are needed vice 'corralling' them for critical billets—this is especially important in career fields with a high presence on the JDAL and/or field grade shortages, e.g., Intelligence and Communications/Computers. A large critical billet requirement increases the need for repetitive joint tours in an already time constrained career path, possibly adversely affecting OPD. The DoD has provided

the above findings to the Chairman, Committee on Armed Services, along with a recommended legislative and regulatory implementation plan. In summary, the plan contained three recommended legislative changes and two DoD regulatory changes:²³²

Proposed Legislative Changes:

- Reduce the 1,000 critical JDA requirement

- Allow in-Service positions with a significant experience in joint matters to be included on the JDAL

- Allow award of joint credit to officers serving on the Contingency Joint Task Forces Headquarters Staffs in positions providing significant joint experience

Proposed DoD Regulatory Changes:

- Permit captain (O-3) positions on the JDAL

- Reallocate JDA billets among joint organizations “based on joint content of positions in those organizations.”

If these changes are implemented, the Services will have additional flexibility to effectively managed its force to optimize OPD opportunities, while meeting Service-specific and joint requirements.

In this chapter, we discussed the evolution of the AF OPD program and its key elements—assignments, education and training. This chapter summarized AF’s efforts to integrate Title IV mandates in their OPD program and revealed deficiencies in the inclusion of JSO Career Guidelines. It was determined the information pertaining to joint officer development was presented in a manner it promoted ‘square-filling,’ which is inconsistent with AF OPD philosophy. Air Force has significantly improved the quality of officers assigned to joint duty, as evidenced by the increased number of BPZ and in-resident graduates assigned to JDAs over the past three years. Although joint duty is

highly encourages, there are still mis-perceptions regarding its importance to OPD. There are several proposed legislative and regulatory changes on the horizon which should provide the AF increased flexibility to manage its officer force and to optimize OPD opportunities, while meeting Service-specific and joint requirements. In our next chapter, we will summarize our research findings and proposed recommendations.

Chapter 9: Summary and Recommendations

Chapter 1 began with the quotation “It is broke, and we need to fix it.”²³³ Those words, spoken by Senator Goldwater in 1985, were a challenge to the Services and JCS to fix their organizational and decision-making problems. This chapter answers the question—have they fixed the problems? In the Goldwater-Nichols Act of 1986, Congress established some very specific joint officer management guidelines to resolve the Services’ joint deficiencies. These mandates affected the promotion, assignment and education of the joint officer. In the same legislation, Congress created a dynamic hero, an officer fully trained, educated and experienced in joint operations—the JSO. In the preceding eight chapters, we outlined the specific legislation affecting the joint officer management of field grade officers and measured AF compliance. After we completed our compliance review, we focused on AF’s OPD program to assess the integration of Title IV concepts and the impact it has had on the AF officer corps.

In this chapter, we summarize AF compliance, after which we highlight any deficiencies and show what initiatives AF has taken to ‘fix the problem.’ Then, we will provide our recommendations, followed by a synopsis of proposed legislation to modify Title IV. Last we provide recommendations for further study. First, we have listed the law’s major provisions impacting our research population. Each provision is annotated to reflect the degree of AF’s compliance with the law. A plus (+) indicates full compliance; a plus sign on top of a minus sign (\pm) indicates partial compliance; and a minus sign (-) indicates non-compliance.

- (+) 1. Establishes an occupational category, referred to as the 'joint specialty,' for the management of officers who are trained in and oriented toward joint matters
- (+) 2. Provides that JSOs shall be selected by SecDef from nominees submitted by the Secretaries of the Military Departments
- (+) 3. Requires that an officer may not be selected for the joint specialty until he/she completes a joint education program and a full joint duty tour
- (+) 4. Requires that 50 percent of joint duty positions in grades above captain/Navy lieutenant be filled by officers who have been nominated or selected for the joint specialty
- (+) 5. Directs SecDef to designate at least 1,000 critical joint duty assignments that must always be filled by JSOs
- (±) 6. Requires SecDef to establish career guidelines for JSOs
- (+) 7. Requires all JSOs and a high proportion of other officers who graduate from a joint school to be assigned immediately to a joint duty position
- (+) 8. Prescribes, subject to a waiver by SecDef, that joint duty tours shall be at least 2 years in length for general and flag officers and at least 3 years in length for other grades
- (+) 9. Requires SecDef to exclude joint training assignments and assignments within the Military Departments in the definition of JDAs
- (+) 10. Specifies that each promotion board, subject to a waiver for the Marine Corps, will consider officers who have served in joint duty assignments, shall include at least one joint duty officer designated by the JCS Chairman
- 11. Establishes the following review process for promotion boards considering joint officers:
 - (+) a. Requires SecDef to furnish to the Secretaries of the Military Departments guidelines to ensure that promotion boards give appropriate consideration to joint duty performance;
 - (+) b. Directs the JCS Chairman to review promotion board reports before they are submitted to SecDef;
 - (+) c. Authorizes the Secretary of a Military Department, if the JCS Chairman determines that the promotion board acted contrary to SecDef's guidelines,

to return the report to the promotion board for further proceedings, convene a special promotion board, or take other appropriate actions

- (+) d. Directs SecDef to take appropriate action to resolve any remaining disagreement between the Secretary of a Military Department and the JCS Chairman
- (±) 12. Requires SecDef ensure that the qualifications of officers assigned to JDAs (to include JSOs not serving in JDAs) are such that certain promotion rates will be achieved²³⁴

The above compliance summary clearly shows the AF has complied with the majority of the provisions of Title IV; however, there are two areas requiring improvement—promotions and career guidance. In this next section, we will discuss AF's efforts to comply and our recommendations to enhance compliance.

As Table 1 in Chapter 4, Promotions, indicated, 46 different promotion categories are tracked. These include three grades, three promotion zones, three joint categories, and two assignment categories. Air Force only met the promotion expectations 5 of the 46 categories for every board conducted. However, it is 16 of these categories that are of real concern, because they have met the expectations for less than half of the boards conducted. Another way of looking at this is, if we consider each board held and each category tracked, AF has had 274 opportunities to meet the promotion expectations, of which they have only succeeded 141 times, for a 51 percent compliance rate.

Air Force has implemented numerous initiatives to ensure compliance. One series of initiatives involved the promotion process itself. First, the AF changed the promotion selection board charge on several occasions to strengthen Title IV content and to stress the importance of giving sufficient promotion consideration to joint

officers. Secondly, the AF modified the OSB to highlight the joint officer status, e.g., Joint Staff, JSO, or Other JDA. This brief is a critical document in the Officer Selection Record and is viewed by the promotion board members. Another change in the promotion selection process involved the addition of joint duty history on the OSB assignment summary listing. The board members now know the specific dates and assignments to joint organizations. Both of these initiatives assure easy identification of joint officers by the promotion boards. These initiatives, coupled with strict adherence to the law's requirements regarding joint representation on each board and the staffing of promotion board results, clearly exhibit AF's concerted efforts to comply in the promotions' area.

However, perhaps the most important initiatives taken to ensure promotion compliance were those designed to send higher quality officers to joint assignments, specifically, in-resident PME students and those promoted BPZ. To ensure quality officers were assigned to joint assignments, AFMPC trained their assignment officers on joint officer management and implemented a program to monitor ISS/SSS joint outplacement. Their emphasis on joint is clearly evident in AFMPC memorandums to ISS/SSS students stressing that joint should be the student's first priority.²³⁵

Additionally, as mentioned several times throughout this paper, AFMPC established a GO reviews of JDAs to ensure high quality officers were going to joint assignments.

Despite these initiatives and the visible improvements in the promotion rates of joint officers (serving in joint assignments meeting promotion boards IPZ and BPZ), the AF is still not in full compliance with the law. In addition to the recommendations in Chapter 4, our research group believes one way to enhance compliance in the area of

promotions, involves creating a joint mind-set throughout the AF. The AF needs to develop a comprehensive program designed to enhance the current awareness regarding joint training, education and assignments. As our ISS/SSS survey indicated, there are future leaders who do not perceive joint duty as important. If this attitude exists anywhere in the AF, there is true cause for concern. These future leaders will be promotion board members, will counsel young officers, and possibly even establish future personnel policy. Jointness is here to stay—the AF needs to devote more energy to re-educating its personnel on the importance of joint. Jointness must be better integrated into the OPD Program.

One way to spread the word about joint is through a comprehensive media program designed to stimulate interest in joint training, education and assignments. This media program should be an on-going effort, not like the ‘joint at a glance’ coverage that was provided the first two years of the law’s enactment. This must evolve into a continuous education program, similar to the AF’s quality program. The importance of joint operations should be emphasized by leadership at every level. Eventually, as this new attitude permeates all corners of the AF and the quality of officers assigned to joint positions continues to increase, these changes should translate to improved promotion rates.

The second area where compliance has not been met involves the establishment of career guidelines for JSOs. Although the AF has a system to track and monitor JSOs in their personnel data-base, and they closely monitor their promotion and NDU outplacement, they have no specific JSO career guidelines, nor does comprehensive guidance exist for officers who want to become joint officers. This deficiency may

have contributed to the failed promotion rates for JSOs. During the mass transition period, thousands of JSOs were designated, with little afterthought regarding their future professional development. They received no distinguishable career counseling, assignment or education opportunities, to ensure they remained competitive for promotion. At the same time, the AF became alarmed when they failed to meet promotion expectations and condemned the transition board process for designating officers without long-term promotability or joint utility. Despite this failure, they never modified their professional development efforts for the JSO. They bought the car and never put gas in it and were surprised when it did not run anymore. Last, if Congress' hope was an officer force familiar with joint assignments, the joint specialty and their importance in OPD, then AF failed as shown by the assignment officers' survey results and the OPD publications.

One way to incorporate joint concepts into OPD is by integrating professional development counseling, to include joint professional growth, into the formal feedback session. Currently, feedback sessions are limited to job performance and professional qualities. Historically, career counseling was accomplished separately from the feedback session and documented on an AF FM 90. However, in 1993, AF discontinued the use of the form, except for its use for PME and special boards, e.g., return to fly, resident PME selection. In effect, this policy change eliminated the AF's only formal means of career counseling. Our research group believes expanding job performance feedback to include professional development counseling would once again provide an avenue whereby senior officers could counsel officers on future assignment and career opportunities. The importance of joint training, education and

assignments could then be discussed during this regularly scheduled counseling session. An adjunct benefit is the resultant streamlining of administrative requirements. The timing for this modification is especially opportune, given the CSAF's new policy requiring feedback for all ranks through colonel.

Thus far in this chapter, we have highlighted AF's Title IV compliance/non-compliance and provided recommendations for two areas of non-compliance—promotions and JSO career guidelines. While the AF cannot change history, there are many initiatives they could implement to strengthen future compliance with the law. Our research group has devised additional recommendations, which may have positive effects on AF's joint officer management efforts.

Our first recommendation affecting the entire spectrum of joint officer management is the development of a more comprehensive data-base to enable an accurate trend analysis. During our research, we found a piecemeal data collection effort beginning with the law's enactment; therefore, making it difficult to determine what joint management efforts have been effective. Further, since AF implemented Title IV, there has been a multitude of personnel programs which must be considered when analyzing joint officer trends. As a result of this research, AFMPC analysts have built a base-line for joint data pertaining to promotions, deferred status rates, PME outplacement, assignments and retention. Hopefully, this data-base will be helpful in conducting trend analysis for any future joint officer management initiatives. Coincidentally, a similar data collection was recommended in the 1995 report from the Panel of Joint Professional Military Education of the Chairman, JCS. This committee recommended the Services begin tracking PME selection, attendance, and outplacement (for three

tours following graduation), in addition to information regarding retention, promotions and joint duty assignment fill rates, in order to improve joint officer management.²³⁶

Our second recommendation addresses the mandate to outplace greater than 50 percent of NDU students to joint duty. The FY93 NDAA provides Services additional flexibility to postpone this requirement for 50 percent (of the greater than 50 percent) of the students until the second tour following NDU graduation. As previously mentioned, the AF has not enacted this provision due to the complexity of tracking procedures. The researchers' recommendation is for AF to implement this provision, because it provides additional flexibility to assign officers to positions which enhance their OPD and are consistent with AF mission requirements. By not implementing this provision because of tracking difficulties, the AF has tied their own hands.

Another area requiring attention is the limited time an officer has to complete Service and joint 'wickets.' One constraint is the precise order JPME and assignments must occur for designation without waiver. This decreases the Services' flexibility to assign or educate the officer when it is optimum for OPD and mission requirements. Legislative change to raise the 10 percent restriction for those requiring sequence or multiple tour waivers for designation would increase this flexibility and provide the Services more latitude to designate based on quality and future utilization, rather than a sequence of assignments and educational events. We agree with the most recent JDAL study recommending captains receive joint duty credit, because it increases the Services' flexibility to assign the best qualified officers. Also, this provision increases the time window an officer has to complete professional development requirements and the Services can benefit longer from the joint experience an officer receives. However,

we are concerned about the impact of this proposal on promotion compliance since it is difficult to determine long-term promotability, as AF has already learned. We propose limiting this potential problem by restricting joint duty tours to only senior captains and delaying the actual award of JDA credit until selection for major.

Another possible solution to time constraints is the revitalization of the cross-flow program. The program encourages Air Staff or Joint Staff officers to move between organizations, providing each organization the benefit of a ‘seasoned’ staff officer, with the big picture. Cross-flow has other benefits including PCS cost savings and no training requirements between tours; however, one of the greatest benefits is the officer achieves two OPD opportunities in one assignment. Each organization must be willing to release officers early and acceptable positions must be available. Nonetheless, both the Air Staff and Joint Staff should strive to groom officers for cross-flow because everyone is a winner.

There are many regulatory and legislative changes on the horizon to further improve joint office management. The listing below highlights several legislative initiatives which are currently being staffed for submission to Congress:

- Allow less than 1,000 critical positions on JDA list

- Allow in-Service positions on JDA list

- Allow JDA credit for officers serving in Joint Task Forces

- Allow 10 percent tour waiver for all second tours

- Exempt JSOs from mandatory JDA requirement upon graduation from JPME

- Modify the promotion comparison group for those officers serving in JDAs other than Joint Staff²³⁷

- Exclude acquisition corps officers from the provision that requires a successive JDA for a proportion of JPME graduates.^{238 239}

This proposed legislation may correct many deficiencies in the original Goldwater-Nichols legislation. As with any new legislation, it will continue to evolve and be refined for years to come. In our research, we identified several potential areas for continued research. First, in our research effort, we limited our analysis of OPD to its inter-relationship with Title IV. However, based on survey results and a review of OPD publications and history, we believe the AF's OPD effort is fertile ground for more in-depth analysis. Secondly, the AF assignment system has undergone a major metamorphosis during the past four years, undergoing its most recent modifications during the past few months. We believe that the evolution of the assignment system and its impact on readiness and OPD warrants additional study. Further, as a follow-on to this study, an analysis of how Title IV mandates have impacted AF readiness has merit—the focus should be whether the forfeit of the best to joint duty impacts AF's mission effectiveness. Last, we recommend another study of Title IV be initiated in the next three years, using this paper as a base-line. At that time, the impact of the AF's force draw-down programs should be fully realized and the full measures of their joint management initiatives should be distinct.

Despite Title IV's complexities, AF has successfully complied with the majority of the mandates by implementing numerous aggressive joint officer management initiatives. But how does senior military leadership view the Service's implementation of Title IV? The following 1992 statement from General Colin Powell provides a good assessment of the law's impact. He credits Title IV with making the Joint Staff one of the best staffs in the world, and sees JPME and joint tours as key to improving the quality of officers assigned to the Joint Staff. Specifically he stated, “the authority

given to the Chairman to review promotion lists from a joint perspective has paid enormous dividends in enhancing jointness. I am confident that without the power of legislation, we would not have seen the progress made over the past six years.”²⁴⁰

Has the law become “one of the landmark laws of American history,” as heralded by Congressman Les Aspin, then Chairman of the House Armed Services Committee?²⁴¹ Since Goldwater-Nichols implementation, American military performance has been nothing less than superb—Panama and the Persian Gulf War being the most visible examples. Whether the history books will attribute these successes to Goldwater-Nichols is unknown. Only time will tell.

Notes

¹ Barry Goldwater, US Senator, Chairman of the Senate Armed Services Committee, “Congressional Oversight of National Defense,” address to Senate, Washington DC, 3 October 1985.

² Ibid., 17.

³ David C. Jones, “Why the Joint Chiefs of Staff Must Change,” Armed Forces Journal International 119, (March 1992): 62-72.

⁴ Quoted in Lt Col Dennis W. Tighe, USA, Unification of Forces: The Road to Jointness?, (monograph AD-A240 252, Fort Leavenworth KS: School of Advanced Military Studies, United States Army Command and General Staff College), 13 September 1991, 2.

⁵ Ibid.

⁶ Ibid.

⁷ General John W. Vessey, Jr., USA, “The Purple World,” Air Force Magazine 68, (October 1985): 56-60.

⁸ Lt Col Christopher A. Yuknis, USA, “The Goldwater-Nichols Department of Defense Reorganization Act of 1986: An Interim Assessment,” (research paper (MU 39080 83), Carlisle Barracks, PA: US Army War College, 1992), 8-9.

⁹ “Defense Organization: The Need for Change,” Armed Forces Journal 123, (October 1985 Extra), 3-61.

¹⁰ The Joint Chiefs of Staff Administrative Publication (JCS Admin Pub) 1.2, Joint Officer Management, 30 June 1989, I-1.

¹¹ Ibid., I-1.

¹² Ibid., I-1 - I-2.

¹³ Ibid., I-2.

¹⁴ Ibid.

¹⁵ US General Accounting Office Report, Goldwater-Nichols Department of Reorganization Act of 1986, GAO/NSIAD 88-78-BR (Washington: GAO, April 1988) 1.

¹⁶ Ibid., 1.

¹⁷ United States Senate Committee on Armed Services, “Goldwater and Nunn Announce Conference Agreement on Defense Reorganization Bill,” press release (Washington DC: GPO, September 11, 1986).

¹⁸ Colonel John B. Keesley, USA (Ret), “Chapter 38: A Triumph of Passion Over Reason (Color It Purple),” Army 38, (May 1988): 13-14.

¹⁹ US General Accounting Office Report, Implementation of the Goldwater-Nichols Department of Defense Reorganization Act of 1986, GAO/T-NSIAD-88-13 (Washington: GAO, 1988) 3.

²⁰ GAO/NSIAD 88-78-BR, 2.

²¹ Ibid.

²² John Ginovsky, “Officer Patterns Being Transformed,” Air Force Times 4, (18 July 1988): 4.

²³ Ibid.

²⁴ United States Congress, National Defense Authorization Act for Fiscal Year 1993, United States Public Law (P.L.) 103-357, secs. 932-933 (1993).

²⁵ United States Congress, National Defense Authorization Act for Fiscal Year 1987, United States Public Law (P.L.) 99-433, (commonly: Goldwaters-Nichols Department of Defense Reorganization Act of 1986) Chapter 38, secs. 661-668 (1986).

²⁶ 10 USC, Chapter 38, sec 661 (c)(2).

²⁷ This research would not have been possible without the cooperation and efforts of the AFMPC staff who maintained countless documents (published and informal) regarding the implementation of the Goldwater-Nichols Act. Our researchers reviewed a vast quantity of literature regarding the legislative history, Congressional testimony, government and public studies, working papers, research documents and innumerable periodicals. Our researchers conducted countless interviews of personnel involved in the implementation of the law, in addition to the current offices of primary responsibility at AFMPC, the Air Staff, the Joint Staff and the Office of the Defense. The majority of data contained in this chapter was obtained from historical working documents or an analysis prepared by the AFMPC staff using historical computer records from the Air Force Personnel Data System.

²⁸ Talking Paper, Air Force Military Personnel Center (DPMRPJ), subject: Joint Specialty Officer Designation Boards, January 1992.

²⁹ P.L., 103-357 sec. 933.

³⁰ Department of Defense Directive (DoDD)1320.5, Assignment to Joint Tours of Duty, 26 July 1978, 1-2.

³¹ Air Force Military Personnel Center, Director of Personnel Management (DPM), to [JSO Designation Board Members], letter, subject: Letter of Instructions, 16 October 1987.

³² Air Force Military Personnel Center, Director of Personnel Management (DPM), to [JSO Designation Board Members], letter, subject: Letter of Instructions, 4 March 1988.

³³ Air Force Military Personnel Center, Director of Personnel Management (DPM), to (JSO Designation Board Members), letter, subject: Letter of Instructions, 21 March 1989.

³⁴ Directorate of Assignments, Air Force Military Personnel Center Operational Instructions (DPMR OI) 36-15, Joint Specialty Officer Designation Boards, 2 February 1988.

³⁵ Ibid.

³⁶ The researchers reviewed the JSO Designation Board slides presented at each of the transition boards. Each briefing outlined Title IV legislation, eligibility criteria, selection process and scoring procedures. These briefings are on file at the AFMPC's Joint Office.

³⁷ Air Force Military Personnel Center, "19-23 October 1987 Joint Specialty Officer Designation Board Proceedings Report," (San Antonio, TX: AFMPC, 22 October 1987).

³⁸ Air Force Military Personnel Center, "7-18 March 1988 Joint Specialty Officer Designation Board Proceedings Report," (San Antonio, TX: AFMPC, 14 March 1988).

³⁹ Air Force Military Personnel Center, "29 March - 7 April 1989 Joint Specialty Officer Designation Board Proceedings Report," (San Antonio, TX: AFMPC, 31 August 1989).

- ⁴⁰ Memorandum, Deputy Secretary of Defense to the Secretaries of the Military Departments and the Chairman of the Joint Chiefs of Staff, subject: Title IV, DoD Reorganization Act of 1986, 21 May 1987.
- ⁴¹ Memorandum, Deputy Secretary of Defense to the Secretaries of the Military Departments and the Chairman of the Joint Chiefs of Staff, subject: Career Guidelines and Oversight Procedures for Joint Specialty Officers and Other Officers Serving in Joint Duty Assignments, 22 July 1987.
- ⁴² Memorandum, Deputy Secretary of Defense to the Secretaries of the Military Departments and the Chairman of the Joint Chiefs of Staff, subject: Additional Guidelines for the Implementation of Title IV, DoD Reorganization Act of 1986, 4 February 1988.
- ⁴³ Talking Paper, Lt Col Dale Vande Hey, Air Force Military Personnel Center (DPMRJ), subject: The Effects of Title IV—Joint Duty Assignment List Stability and Growth, 11 March 1988.
- ⁴⁴ Memorandum, Vice Director Joint Staff to the Military Service Chiefs, subject: Initial Joint Duty Assignment List, DJSJ 1774-87, 1 September 1987.
- ⁴⁵ Talking Paper, Captain Julie Stanley, Air Force Military Personnel Center (DPMRJ1), subject: Joint Specialty Officer Revalidation, 24 February 1992.
- ⁴⁶ Staff Summary Sheet, Major Holoviak, Air Force Military Personnel Center (DPMRJ3), JSO Designation Boards, 3 January 1989.
- ⁴⁷ Commander Air Force Military Personnel Center to [JSO Designation Board Members], letter, subject: Letter of Instructions, 13 November 1991.
- ⁴⁸ Staff Summary Sheet, Captain Julie Stanley, Air Force Military Personnel Center (DPMRPJ), subject: Joint Specialty Officer Designation Board, 31 January December 1991.
- ⁴⁹ Transmittal Document (AFMPC Form 6), Captain Larry Hall, Air Force Military Personnel Center (DPMRPJ), subject: JSO Designation Board, 15 October 1993.
- ⁵⁰ Data Matrix, Captain Dave McCormick, Air Force Personnel Center (DPMYAF), Response to query from Major Stanley, 30 March 1995.
- ⁵¹ Ibid.
- ⁵² Ibid.
- ⁵³ Captain Julie Stanley, Air Force Military Personnel Center (DPMRPJ1), Joint Specialty Officer Designation Revalidation, staff study, 23 January 1992.
- ⁵⁴ Staff Summary Sheet, Major Jack Hales and Captain Thelma Hales, Air Force Military Personnel Center (DPMRPJ), subject: Joint Specialty Officer Designation Board, 7 October 1992.
- ⁵⁵ Briefing, Air Force Military Personnel Center (DPMRPJ) to Air Force Director of Personnel, subject: JSO Revalidation, February 1992.
- ⁵⁶ Department of Defense (DoD) (Draft) Directive XXXX, Joint Officer Management, undated, 24-28.
- ⁵⁷ Memorandum, Assistant Secretary of Defense Force Management and Personnel (FM&P), to the Chief of Staff of the Air Force, subject: Joint Specialty Officer (JSO) Revalidation, 29 June 1992.
- ⁵⁸ Memorandum, Assistant Secretary of Defense Force Management and Personnel (FM&P), to the Department of the Army, subject: Army JSO Revalidation, 7 April 1993.

- ⁵⁹ Staff Summary Sheet, Major Jack Hales, Air Force Military Personnel Center (DPMRPJ), subject: Joint Specialty Officer Revalidation, 30 September 1992.
- ⁶⁰ Commander Air Force Military Personnel Center to Joint Specialty Officers, letter, subject: Joint Specialty Officer (JSO) Designation Revalidation, 11 August 1992.
- ⁶¹ Memorandum, Secretary of Defense to (WHO) , subject: Joint Specialty Officer Revalidation, 8 April 1993.
- ⁶² Director of Assignments Air Force Military Personnel Center to Joint Specialty Officers [whose status was being removed], letter, subject: Joint Specialty Officer Designation Revalidation, 21 May 1993.
- ⁶³ 10 USC, Chapter 38, secs. 661 e (1)(2)(3)(4)(5) and 665(2).
- ⁶⁴ Talking Paper, Lt Col Dale Vande Hey, Air Force Military Personnel Center (DPMRSS), subject: Career Guidelines for Officers with the Joint Specialty, 28 October 1986.
- ⁶⁵ Department of the Air Force, Deputy Chief of Staff, Personnel, Implementation of the Goldwater-Nichols Department of Defense Reorganization Act, Title IV, Joint Officer Personnel Management, Program Action Directive 87-1, 23 January 1987, 23-24.
- ⁶⁶ AFP 36-13, Officer Professional Development, 1 March 1989, 55-56.
- ⁶⁷ AFP 36-2630, Officer Professional Development Guide, DRAFT, undated.
- ⁶⁸ Ibid., 59.
- ⁶⁹ Ibid., 9.
- ⁷⁰ Ibid., 6.
- ⁷¹ Ibid., 59.
- ⁷² 10 USC, Chapter 38, secs. 661-668, as amended.
- ⁷³ Staff Summary Sheet, Colonel Brian Erickson, HQ USAF (DPXOX), subject: Joint Officers Promotion Objectives, 29 January 1992.
- ⁷⁴ Memorandum, Deputy Secretary of Defense, to the Secretaries of the Military Departments and the Chairman of the Joint Chiefs of Staff; subject: Additional Guidelines for Administration of Joint Duty Assignment (JDA) Programs., 22 August 1988.
- ⁷⁵ Staff Summary Sheet, HQ USAF (DPXOP), subject: Secretary of the Air Force Formal Charge to Air Force Selection Boards, 26 June 1987.
- ⁷⁶ Memorandum of Instructions for CY94A Lieutenant Colonel Central Selection Board, [to board members], 11 October 1994.
- ⁷⁷ Staff Summary Sheet, Air Force Military Personnel Center (DPMAB), subject: Changes to the Officer Selection Brief and Formal Charge for Promotion Boards, 30 October 1991.
- ⁷⁸ Memorandum, Commander Air Force Military Personnel Center to the Air Force Director of Personnel, subject: OSB Change - Joint Duty Information, 23 September 1993.
- ⁷⁹ Electronic Mail (E-mail), Air Force Military Personnel Center (DPMAB), Captain Donald Barnes, to Major Dale Bourque, ACSC, 28 March 1995.
- ⁸⁰ NOTE: The following abbreviations apply to Table 1: Joint Staff(JT Staff); Joint Staff Officer (JSO); Other Joint (Other JT); Lieutenant Colonel (LT COL).
- ⁸¹ Air Force Instruction (AFI) 36-2110, Assignments, 20 July 1994, 17.
- ⁸² Ibid.

- ⁸³ Air Force Regulation (AFR) 36-89, Promotion of Active Duty List Officers, 17 April 1992, 8.
- ⁸⁴ House, Report of the Committee on Armed Services to Accompany S. 1918, Defense Officer Personnel Management Act, 96th Cong., 2d sess., 1980, 96-1462, 8, 9.
- ⁸⁵ Data Matrix. DPMAP.
- ⁸⁶ 10 USC, Chapter 38, sec. 668 (b)(2)(A).
- ⁸⁷ 10 USC, Chapter 38, sec. 668 (a)(1)(2)(3).
- ⁸⁸ 10 USC, Chapter 38, sec. 668 (b)(A)(B).
- ⁸⁹ 10 USC, Chapter 38, sec. 661 (d).
- ⁹⁰ 10 USC, Chapter 38, sec. 661 (d)(2)(A).
- ⁹¹ Ibid.
- ⁹² 10 USC, Chapter 38, sec. 661 (d)(2)(B).
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- ¹⁰² 10 USC, Chapter 38, sec. 663 (d)(1).
- ¹⁰³ 10 USC, Chapter 38, sec. 663 (d)(2).
- ¹⁰⁴ P.L. 103-357, sec. 933.
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- ¹⁴⁵ CM-1618-93, II-4.
- ¹⁴⁶ 10 USC, Chapter 38, sec. 661(c)(A).
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- ¹⁴⁸ House Committee on Armed Services, Report of the Panel on Military Education, 101st Cong., 1st sess., 21 April 1989, 1-8.
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- ¹⁵¹ CM-1618-93, III-8, 9.
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- ¹⁵⁶ Briefing, Air Force Military Personnel Center (DPMRPC), subject: Senior Service School Selection Board Procedures, 30 August 1990.
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- ¹⁷² Telefax Memo, Major Provenzano, 19 January 1995.
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- ¹⁷⁷ Staff Summary Sheet, Major General William B. Davitte, Commander Air Force Military Personnel Center, Officer PME Selection Board Processes, 10 February 1995.
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- ¹⁸² Inter-Office Routing Slip, Air Force Military Personnel Center (DPMRJJ1) Captain Larry Hall, subject: Prioritization of JPME Phase II Quotas, 17 November 1993.
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Appendix A: Abbreviations and Acronyms

ACSC	Air Command and Staff College (Air Force)
AF	Air Force
AF FM 90	Air Force Form 90, Assignment Work Sheet
AF/DP	Air Force Director Of Personnel
AFI	Air Force Instruction
AFMC	Air Force Materiel Command
AFMPC	Air Force Military Personnel Center
AFP	Air Force Pamphlet
AFPD	Air Force Policy Directive
AFR	Air Force Regulation
AFSC	Armed Forces Staff College
APZ	Above the Promotion Zone
ASD(FM&P)	Assistant Secretary of Defense (Force Management and Personnel)
AWC	Air War College (Air Force)
AY	Academic Year
BPZ	Below the Promotion Zone
CD	Cross Departmental
CINC	Commander in Charge
CJCS	Chairman of the Joint Chiefs of Staff
COS	Critical Occupational Specialty
CY	Calendar Year
DepSecDef	Deputy Secretary of Defense
DH	Dual Hat
DoD	Department of Defense
DPMR	Director of Assignments
EBB	Electronic Bulletin Board
FY	Fiscal Year
G/FO	General/flag officer
GO	General officer
HASC	House Armed Services Committee
ICAF	Industrial College of the Armed Forces
IG	Inspector General
IPZ	In the Promotion Zone
ISS	Intermediate Service School
J-1	Directorate for Manpower and Personnel
J-7	Directorate for Operational Plans and Interoperability
JCS	Joint Chiefs of Staff
JDA	Joint Duty Assignment
JDAL	Joint Duty Assignment List
JDAMIS	Joint Duty Assignment Management Information System

JMA	Joint Manned Activity
JPME	Joint Professional Military Education
JS	Joint Staff
JSO	Joint Specialty Officer
LMI	Logistics Management Institute
MAJCOM	Major Command
MEPD	Military Education Policy Document
ML	Management Level
MOP	Memorandum of Policy
MWS	Major Weapons System
NDAA	National Defense Authorization Act
NDU	National Defense University
NWC	National War College
OAS	Officer Assignment System (formally OVAS)
OER	Officer Effectiveness Report
OES	Officer Evaluation System
OPD	Officer Professional Development
OSB	Officer Selection Brief
OSD	Office of the Secretary of Defense
OVAS	Officer Volunteer Assignment System
P.L.	Public Law
PAD	Program Action Directive
PAJE	Process for Accreditation of Joint Education
PDS	Personnel Data System
PJE	Program for Joint Education
PME	Professional Military Education
SAC	Senior Acquisition Course
SASC	Senate Armed Services Committee
SecAF	Secretary of the Air Force
SecDef	Secretary of Defense
SOS	Squadron Officer School
SSS	Senior Service School
TDY	Temporary Duty
TOS	Time on Station
USA	United States Army
USAF	United States Air Force
USC	United States Code
USN	United States Navy

Appendix B: Definitions

Accreditation. The granting of approval to an institution of learning by the Chairman of the Joint Chiefs of Staff after the school has satisfied the requirements specified in the PAJE.

Critical Occupational Specialty. A military occupational specialty selected from among the combat arms in the Army or equivalent military specialties in the Navy, Air Force, and Marine Corps. Equivalent military specialties are those engaged in the operational art to attain strategic goals in a theater of conflict through the design, organization, and conduct of campaigns and major operations.

Critical Joint Duty Assignment Billet. A joint duty assignment position for which, considering the duties and responsibilities of the position, it is highly important that the assigned officer be particularly trained in, and oriented toward, joint matters. Critical billets are selected by heads of joint organizations, approved by the Secretary of Defense, and documented in the Joint Duty Assignment List.

Cross-Department Joint Duty Assignment. An assignment in which an officer serves full-time duties with another Military Department or with the armed forces of another nation.

Direct Entry. This term describes an officer who directly enters the PJE Phase II course, without first completing an approved PJE Phase I course of instruction (or graduating from a resident program of a Service college in academic 1985-1989) or a PJE Phase I equivalent program approved by the Chairman of the Joint Chiefs of Staff.

Dual-Hat Joint Duty Assignment. An assignment in which the incumbent officer has responsibilities to both a Service and a joint, combined, or international organization or activity.

Joint Duty Assignment. An assignment to a designated position in a multi-Service or multinational command or activity that is involved in the integrated employment or support of the land, sea, and air forces of at least two of the three Military Departments. Such involvement includes, but is not limited to, matters relating to national military strategy, joint doctrine and policy, strategic planning, contingency planning, and command and control of combat operations under a unified command.

Joint Duty Assignment List. The JDAL, which must be approved by ASD(FM&P), is a consolidated listing of all JDAs. Assignments for joint education and/or temporary positions do not qualify as a JDA and will not be listed on the JDAL. The JDAL does not include positions requiring grades)-3 and below and below, Reserve components,

or professional specialties. The position management file of the Joint Duty Assignment Management Information System (JDAMIS) will constitute the official statement of JDA positions. It will be modified only in consonance with the approval authority specified above. The JDAL is maintained by the Chairman of the Joint Chiefs of Staff and updated at least annually. The JDAL contains:

- a. All 0-4 through 0-6 positions for the joint organizations directly responsible for joint planning and employment of joint forces.
- b. No more than 50 percent of the 0-4 through 0-6 positions within DoD agencies and within other selected joint activities that provide direct or indirect support, or administrative or technical support of joint forces.
- c. All general and flag officer JDAs in the joint activities mentioned in subparagraphs a and b above.

Jointly Manned Activity. A joint organization, activity, or element that has a single Service designated as Executive Agent.

Joint Matters. Matters relating to the integrated employment of land, sea, and air forces, including matters relating to national military strategy, strategic and contingency planning, and command and control of combat operations under a unified command.

Joint Professional Military Education. The resident professional military education programs of the National Defense University and other curriculums that may be designated by the Secretary of Defense, with the advice and assistance of the Chairman, Joint Chiefs of Staff. JPME addresses the integrated employment of land, sea, and air forces at all levels of war.

Joint Professional Military Education Schools. The following components of NDU are JPME schools: NWC, ICAF, and AFSC. These schools are under the supervision of the Chairman of the Joint Chiefs of Staff through the President, NDU, and are, by law, fully joint in mission and orientation.

Joint Specialty Officer or Joint Specialist. An officer designated as a Joint Specialty Officer by the Secretary of Defense, who is educated and experienced in the employment, deployment, and support of unified and combined forces to achieve national security objectives.

Joint Specialty Officer Designation Board. A board convened by the Secretary of a Military Department to consider officers for recommendation to the Secretary of Defense for designation of the joint specialty.

Joint Specialty Officer Nominee. An officer who has completed a program of Joint Professional Military Education, or who is in a joint duty assignment and has a critical

occupational specialty and, in either instance, has been designated as a JSO nominee by the Military Department concerned.

Military Education. The systematic instruction of individuals in subjects which will enhance their knowledge of the science and art of war.

Process for Accreditation of Joint Education. The PAJE is a CJCS-approved process for assessing an educational institution's conduct of the PJE.

Professional Military Education. PME provides individuals with the skills, knowledge, understanding, and appreciation that enable them to make sound decisions in progressively more demanding command and staff positions within the national security environment. PME has as its primary theme the employment of combat forces, with strategy being increasingly emphasized at the intermediate, senior, and G/FO levels. It addresses the military, political, economic, social, and psychological dimensions of national security with varying degrees of emphasis on the planning and conduct of war, Service organizations, joint and combined operations, force employment and deployment concepts, and military leadership.

Program for Joint Education. PJE is a JCS-approved body of principles and conditions that prescribes, at both the intermediate and senior levels of PME, the joint curriculums, student-faculty mixes and ratios, seminar Service mixes, standards, and learning objectives for all educational programs designed to qualify officers for JSO designation. NWC and ICAF curriculums encompass the entire PJE. Other educational institutions approved by the Chairman of the Joint Chiefs of Staff conduct PJE Phase I and AFSC conducts PJE Phase II. Officers who complete both PJE Phase I and PJE Phase II satisfy the educational requirements for JSO qualification.

a. PJE Phase I. That portion of the PJE that is incorporated into the curriculums of intermediate-and senior-level Service colleges and other appropriate educational programs, which meet PJE criteria and are accredited by the Chairman of the Joint Chiefs of Staff.

b. PJE Phase II. That portion of the PJE that complements PJE Phase I. Taught at AFSC to both intermediate-and senior-level students. Integrated, along with PJE Phase I, into the curriculums of the NWC and ICAF

Title IV. The Department of Defense Reorganization Act of 1986 (P.L. 99-433), also known as the Goldwater-Nichols Act, has six titles. Title IV of the act established joint officer personnel policies, including statutory requirements for the education and assignments of JSOs. Provisions of title IV are codified in 10 USC 38.

Title 10. As used in this document, a shorthand term for the authority of the Secretary of Defense to use personal services contracts to hire civilians for NDU faculties and the

authority of the Secretaries of the Military Departments to use personal services contracts to hire civilians for the faculties of certain Service colleges.

Appendix C1: Title IV Promotion Requirements

Title IV promotion requirements are sub-divided into several areas: promotion objectives, promotion board procedures, promotion report processing, and promotion rate reporting. This appendix provides the requirements provided in the law for each of these areas.

First, let us consider the promotion objectives as they apply to officers serving on the Joint Staff, designated as JSOs, and serving in Other Joint Duty Assignments. Title 10, Chapter 36, Promotion, Separation, and Involuntary Retirement of Officers on The Active-Duty List, Section 646, Consideration of Performance as a Member of The Joint Staff, provides that: The SecDef, in consultation with the Chairman, will ensure that AF officer promotion policies give appropriate consideration to the performance of officers on the Joint Staff.

Title 10, Chapter 38, Joint Officer Management, Section 662(a)(1),(2),&(3) provides that the SecDef shall ensure that the qualifications of officers assigned to joint duty assignments are such that:

Officers who are serving on, or have served on, the Joint Staff are expected, as a group, to be promoted to the next higher grade at a rate not less than the rate for officers of the same grade and competitive category who are serving on, or have served on, the headquarters staff of the Air Force.

Officers who have the joint specialty are expected, as a group, to be promoted at a rate not less than the rate for officers of the same grade and competitive category who are serving on, or have served on, the headquarters staff of the Air Force.

Officers who are serving on, or have served in, joint duty assignments (other than officers on the Joint Staff or who have the joint specialty) are expected, as a group, to be promoted to the next higher grade at a rate not less than the rate for all Air Force officers of the same grade and competitive category.

Now consider the promotion board procedures provided in the law. They center around joint representation on promotion boards and joint guidelines to promotion boards.

Title 10, Chapter 36, Section 612(c) provides that:

Each selection board convened to recommend officers on the Active Duty list for promotion to the next higher grade that will consider officers who are serving in, or have served in, joint duty assignments will include at least one officer (who is currently serving in a joint duty assignment) designated by the Chairman of the Joint Chiefs of Staff.

Title 10, Chapter 36, Section 615(c) provides that:

The SecDef, with the advice and assistance of the Chairman of the Joint Chiefs of Staff, will furnish to the SecAF guidelines for the purpose of ensuring that each selection board convened to recommend officers on the Active Duty list for promotion to the next higher grade gives appropriate consideration to the performance in joint duty assignments of officers who are serving, or have served, in such assignments.

Promotion report processing has instructions outlined in the law to cover the Chairman's review of board reports. This applies to both Central Promotion Boards and Special Selection Boards. Title 10, Chapter 36, Section 618(b) provides that:

The SecAF will submit to the Chairman of the Joint Chiefs of Staff the report of selection boards that considered officers who are serving, or have served, in joint duty assignments.

The Chairman shall review the report of selection boards that considered officers who are serving, or have served, in joint duty assignments to determine if:

The selection board acted consistent with SecDef guidelines to give appropriate consideration to the performance in joint duty assignments of officers who are serving, or have

served, in such assignments; and that the selection board otherwise gave such appropriate consideration.

After reviewing the report, the Chairman will return the report, with his determinations and comments, to the SecAF.

If the Chairman determines that the board acted contrary to SecDef guidelines or otherwise failed to give appropriate consideration to the performance of officers in joint duty assignments, the SecAF may:

Return the report, with the Chairman's determinations and comments, to the selection board (or subsequent board) for further proceedings; or convene a special selection board; or take other appropriate action to satisfy the concerns of the Chairman.

If the SecAF and the Chairman remain in disagreement, the SecAF shall indicate such disagreement, and the reasons for such disagreement, as part of his transmittal of the report to the SecDef including any comments submitted by the Chairman.

If the SecAF and the Chairman agree, the SecAF will submit the report, with his recommendations, to the SecDef.

Title 10, Chapter 36,, Section 628(c)(2)provides that:

The processing of board reports through the Chairman applies to the results of special selection boards.

The SecDef is tasked to provide promotion rate reports to the Congress. Title 10,

Chapter 38, Section 662(b)provides:

that the SecDef will periodically (not less often than every six months) report to Congress on the promotion rates of officers who are serving in, or have served in, joint duty assignments, especially with respect to the record of officers selection boards in meeting the objectives of 10 USC 662(a)(1),(2),&(3). If such promotion rates fail to meet such objectives, the SecDef shall include in the periodic report information on such failure and on what action the SecDef has taken or plans to take to prevent further failures.

Title 10, Chapter 38, Section 667, Annual Report to Congress, provides that the SecDef will include the following in the annual report:

The promotion rate for officers In-The-Promotion Zone (IPZ) who are serving on the Joint Staff compared with the promotion rate for other officers considered for promotion IPZ in the same grade and competitive category serving on the Air Force Headquarters staff and provides the Air Force average.

The promotion rate for officers In-The-Promotion Zone (IPZ) designated as JSOs compared with the promotion rate for other officers considered for promotion IPZ in the same grade and competitive category serving on the Air Force Headquarters staff and provides the Air Force average.

The promotion rate for officers In-The-Promotion Zone (IPZ) who are serving in other joint duty assignments compared with the promotion rate for other officers considered for promotion IPZ in the same grade and competitive category serving on the Air Force Headquarters staff and provides the Air Force average.

The promotion rate for officers Below-The-Promotion Zone (BPZ) who are serving on the Joint Staff, designated as JSOs, and those in other joint duty assignments compared with the promotion rate for other officers considered for promotion BPZ in the same grade and competitive category serving on the Air Force Headquarters staff and provides the Air Force average.

The promotion rate for officers Above-The-Promotion Zone (APZ) who are serving on the Joint Staff, designated as JSOs, and those in other joint duty assignments compared with the promotion rate for other officers considered for promotion APZ in the same grade and competitive category serving on the Air Force Headquarters staff and provides the Air Force average.

These provisions in the law guide the day-to-day implementation of the officer promotion program and the subsequent DoD and Service implementing instructions.

Appendix C2: Chronology Table

Knowing what the law provides is just part of the joint story. Seeing what the Services have done to balance law and policy guidance within Service systems provides another chapter. Table 5 provides a chronology of actions with respect to the promotion issues surrounding joint officers and the promotion board chronology.

Table 5: Promotion Chronology

DATE	ITEM	DESCRIPTION
16 Oct 85	Senate Armed Services Committee Report on <u>Defense Organization: The Need For Change</u> , 99th Congress 1st Session, 99-86. ¹	Outlined the need for increased quality on OJCS Staff
11 Sep 86	Senate and House conferees agree on Goldwater-Nichols DoD Reorganization Act of 1986 ²	Provisions would “improve the performance of officers in joint duty positions by establishing management procedures for their selection, education, assignment, and promotion; . . .”
1 Oct 86	Public Law 99-433 (Goldwater-Nichols DoD Reorganization Act of 1986) passes	Places the provision of the Goldwater-Nichols DoD Reorganization Act in law
21 May 87	AF/DPXOP Staff Summary Sheet, dated 26 Jun 87 ³	The SecAF Formal Charge to promotion boards was changed to add that promotion boards “. . . should give appropriate consideration to the performance in joint duty assignments of officers who are serving in or have served in such assignments.”

DATE	ITEM	DESCRIPTION
21 May 87	DepSecDef Memo dated 21 May 87 ⁴	Provides DoD instructions pending publishing of DoD directive. This memo gave an effective date (boards convening after 1 February 1987), provided words for use in the SecAF Formal Charge to promotion boards, and provided that board . . . results will contain appropriate statistical summaries and analyses.”
6 Jul 87	AF/DPXOP Staff Summary Sheet, dated 26 Jun 87 ⁵	The SecAF Formal Charge to promotion boards was changed to specify that promotion boards . . . will give appropriate consideration to the performance in joint duty assignments of officers who are serving in or have served in such assignments.”
19 Oct. 87	JSO Designation Bd	First JSO Designation Board during transition held
7 Mar 88	JSO Designation Bd	Second JSO Designation Board during transition held
6 Jun 88	CY88 Maj Bd	CJCS Memo, undated. The Chairman found that the board . . . acted in consonance with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance of those officers assigned joint duty.” ⁶
28 Mar 89	JSO Designation Bd	Third JSO Designation Board during transition held
15 May 89	CY89 Lt Col Bd	VCJCS Memo, dated 21 Jun 89. The Chairman found that the board “. . . acted in consonance with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments . . .” ⁷
19 Jun 89	DepSecDef Memo dated 19 Jun 89 ⁸	Provided that JSO promotion data tracked will be for “. . . all JSO, JSOs presently serving in JDAs, and JSOs who have served in JDAs since 1 January 1987.” Also provided that the other joint category will not include JSOs and officers on the Joint Staff
30 Jun 89	JCS Admin Pub 1.2, dated 30 Jun 89	Provides that “. . . the Chairman, Joint Chiefs of Staff, provides written comments and determinations as an attachment to promotion board documentation. . . .” Also it provides that the SecDef Annual Report to Congress include a “. . . summary of each Service’s success in meeting the promotion rate objectives.” ⁹

DATE	ITEM	DESCRIPTION
10 Jul 89	CY89 Col Bd	CJCS Memo, dated 16 Aug. 89. The Chairman found that the board “. . . acted in consonance with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments . . .” ¹⁰
4 Dec 89	CY89 Maj Bd	Asst. SecDef Memo provides that the “. . . The Chairman, JCS, also reviewed the results of this board and determined that the Board gave appropriate consideration to officers who have served in joint duty assignments.” ¹¹
16 Jan 90	CY90 Lt Col Bd	CJCS Memo, dated 23 Feb. 90. The Chairman concurred with the nominations and provided that it is evident that the AF was making real progress in meeting promotion criteria ¹²
16 Jul 90	CY90 Col Bd	CJCS Memo, dated 24 Aug. 90. The Chairman found that the board “. . . acted in consonance with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments . . .” ¹³
15 APR 91	CY91A Lt Col Bd	CJCS Memo, dated 20 May 1991. The Chairman expressed concern over the failure to “. . . meet the mandates of Title IV in the category of Joint Specialty officers (JSOs) at the 0-5 level. . . .” However, found that the board “. . . acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments.” ¹⁴
8 Jul 91	CY91 Maj Bd	CJCS Memo, dated 9 August 1991. The Chairman found that the board “. . . acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments.” ¹⁵
9 Sep 91	CY91 Col Bd	CJCS Memo, dated 21 Oct. 91. The Chairman expressed concern on the low percentage of officers selected from several categories, but offered no objection to the officers recommended for promotion. ¹⁶
9 Oct. 91	SecAF Memo, dated 9 Oct. 91 ¹⁷	Letter to CJCS related that the SecAF directed general officer approval of all assignments to joint duty.

DATE	ITEM	DESCRIPTION
2 Dec 91	AFMPC/DPMAB Staff Summary Sheet, dated 30 October 1991 ¹⁸	SecAF approval to strengthen the board charge and clearly identified joint officers to board members.
Dec 91	JSO Designation Bd	Fourth JSO Designation Board held (after transition)
2 Dec 91	CY91B Lt Col Bd	CJCS Memo, dated 16 Jan 92. The Chairman expressed concern over JSO rates, but “. . . determined that the board acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance of joint duty assignments . . .” ¹⁹
4 Feb. 92	Revised DoDD 1320.12, Defense Officer Promotion Program, pg 6. ²⁰	Supplemented the law by requiring that the written instructions to selection boards include guidelines to ensure that the board give appropriate consideration to joint officers.
6 Jul 92	CY92A Col Bd	CJCS Memo, dated 14 Aug. 92. The Chairman “. . . determined that the board acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance of joint duty assignments . . .” ²¹
16 Nov 92	CY92B Lt Col Bd	CJCS Memo, dated 21 Dec 92. The Chairman “. . . determined that the board acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance of joint duty assignments . . .” ²²
7 Dec 92	CY92C Maj Bd	CJCS Memo, dated 14 Jan 93. The Chairman “. . . determined that the board acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance of joint duty assignments . . .” ²³
Jun 93	Revalidation of JSOs	Revalidation of JSOs completed. Personnel system updated.
12 Jul 93	CY93 Col Bd	CJCS Memo, dated 17 Aug. 93. The Chairman agreed with the Acting SecAF (General McPeak) that Joint Staff rate shortfalls “. . . was a result of assignment practices and not a failure of the board to give appropriate consideration.” The Chairman “. . . determined that the board acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance of joint duty assignments . . .” ²⁴
Oct. 93	JSO Designation Bd	Fifth JSO Designation Board held (after transition)

DATE	ITEM	DESCRIPTION
12 Oct. 93	OSB Change	Starting with the CY93 Lt Col Board, joint duty history and tour dates were added to the OSB ²⁵
12 Oct. 93	CY93 Lt Col Bd	CJCS Memo, dated 30 Nov 93. The Chairman “. . . determined that the board acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance of joint duty assignments . . .” ²⁶
6 Dec 93	CY93B Maj Bd	CJCS Memo, dated 19 January 1994. The Chairman provided that the board “. . . acted in a manner consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments . . .” ²⁷
7 Jan 94	CJCSI 1330.02, 7 Jan 94, pg 5 ²⁸	Joint Staff Instruction, Review of Promotion Selection Board Results by the Chairman of the Joint Chiefs of Staff, published. Added an additional category of tracking, ‘Other Joint Modified’, will be comparable to the Other Joint category except that it will include JSOs. This instruction replaced JCS MOP 198, 12 Sep 88.
11 Jul 94	CY94 Col Bd	CJCS Memo, dated 3 October 1994. The Chairman provided that the board “. . . acted in a manner consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments . . .” ²⁹
22 Aug. 94	CY94 Maj Bd	CJCS Memo, dated 16 November 1994. The Chairman provided that the board “. . . acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments . . .” ³⁰
11 Oct. 94	CY94 Lt Col Bd	CJCS Memo, dated 15 September 1994. The Chairman provided that the board “. . . acted consistent with . . .” SecDef guidance and “. . . gave appropriate consideration to the performance in joint duty assignments . . .” The Chairman also provided “I am encouraged by the improvement in the Joint Staff ‘currently serving’ results. There is still, however, a shortfall in the ‘have served’ category as was reflected in last year’s board results and in the ‘below zone’ category for officers serving in Other Joint duty” ³¹
6-9 Mar 95	JSO Designation Bd	Sixth JSO Designation Board held (after transition)

Appendix C3: Promotion Comparison Scheme One

This comparison uses a percentage rate which is an average from all the boards held in that grade and compares the categories ‘as a group’ instead of being separated into the serving-in and have-served categories. This ‘as a group’ comparison is based on the wording in 10 USC 662 which provides that joint officers are expected, as a group to be promoted at rates not less than particular AF rates. These rates are not grouped in this manner in the report on joint rates provided to Congress. In this report, the serving-in joint rates are compared against serving-in AF rates as provided in 10 USC 662 and 667, and the have-served joint rates are included as provided in 10 USC 662 (the serving-in and have-served rates are provided in promotion comparison Scheme 3, Appendix C5). The grouping combines the joint serving-in and the have-served categories (except for JSOs which are already grouped together) and compares this grouping to similar groupings of AF categories. In addition to grouping rates together, this comparison scheme compares the average rates of all the promotion boards held which have considered joint officers, instead of breaking out the rates by board (board-b- board rates are compared in Schemes 2 and 3). As a reminder, the Joint Staff (JS Ave) and JSO averages (JSO) are compared to the AF Headquarters average (HQ Ave) and the Other Joint average (OJ Ave) is compared to the service average (Svc Ave). Table 6 shows for promotion to colonel (Col), lieutenant colonel (LtC), and major (Maj), the average percentage of selection in the particular promotion zone (IPZ, BPZ, and APZ) in joint and AF categories. Added to the table under the columns titled ‘Met Law’ is whether the category met the expectations

in the law (Yes or NO provided) and the number of times (the 'Rate') the column or row has met the expectations of the law. Those rates denoting when categories have met the law less than 50 percent of the time are bolded.

Table 6 shows the actual average percentages by category, zone, and grade. At this macro-level it appears the failed areas are at the colonel and lieutenant colonel levels. An analysis of the data in the table below shows the following potential problem areas, which have met the promotion expectations less than 50 percent of the time:

- Officers meeting colonel boards coded as Joint Staff
- JSOs meeting colonels and lieutenant colonel boards
- Joint officers meeting colonel and lieutenant colonel boards IPZ
- Joint officers meeting colonel boards BPZ.

Table 6: As a Group Average Promotion Rate Comparison

		Percent	Met	Percent	Met	Percent	Met	
Grade	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
To Col	JS Ave	58.6	No	5.5	No	8.4	Yes	1 of 3
	JSO	61.2	No	5.5	No	5.7	Yes	1 of 3
	HQ Ave	64.2	N/A	7.4	N/A	5.5	N/A	
	OJ Ave	45.8	Yes	1.9	No	2.7	Yes	2 of 3
	Svc Ave	43.0	N/A	3.0	N/A	2.1	N/A	
	Rate	1 of 3		0 of 3		3 of 3		4 of 9
To LtC	JS Ave	88.3	No	8.2	Yes	21.2	Yes	2 of 3
	JSO	80.9	No	4.6	No	6.9	No	0 of 3
	HQ Ave	88.6	N/A	7.2	N/A	10.8	N/A	
	OJ Ave	70.3	Yes	3.1	Yes	4.3	Yes	3 of 3
	Svc Ave	64.1	N/A	2.5	N/A	3.7	N/A	
	Rate	1 of 3		2 of 3		2 of 3		5 of 9
To Maj	JS Ave	94.7	No	14.3	Yes	N/A	N/A	1 of 2
	HQ Ave	95.9	N/A	10.8	N/A	N/A	N/A	
	OJ Ave	84.4	Yes	3.5	Yes	17.1	Yes	3 of 3
	Svc Ave	77.6	N/A	1.7	N/A	9.7	N/A	
	Rate	1 of 2		2 of 2		1 of 1		4 of 5

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Appendix C4: Promotion Comparison Scheme Two

This comparison of board-by-board promotion rates considers the various joint categories ‘as a group’ and compares those to the AF categories ‘as a group.’ This ‘as a group’ comparison is based on the wording in 10 USC 662 which provides that joint officers are expected, as a group, to be promoted at rates not less than particular AF rates. These rates are not compiled in this manner in the report on joint rates provided to Congress. In this report, the serving-in joint rates are compared against serving-in AF rates as provided in 10 USC 662 and 667 and the have-served joint rates are included as provided in 10 USC 662 (the serving-in and have-served rates are provided in promotion comparison Scheme 3, Appendix C5). The grouping combines the joint serving-in and the have-served categories (except for JSOs which are already categorized together) and compares this group to similar groupings of AF categories. As a reminder, the Joint Staff (JS Ave) and JSO averages (JSO) are compared to the AF Headquarters average (HQ Ave) and the Other Joint average (OJ Ave) is compared to the service average (Svc Ave). Tables 7-14 show for promotion boards to colonel (Col), lieutenant colonel (LtC), and major (Maj), the percentage of selection in the particular promotion zone (IPZ, BPZ, and APZ) in the joint and AF categories for each promotion board. Added to the tables under the columns titled ‘Met Law’ is whether the category met the expectations in the law (Yes or No provided) and the number of times (the ‘Rate’) the column or row has met the expectations of the law. Those rates denoting when categories have met the law less than 50 percent of the time are bolded.

Table 7 shows officers placed in the Joint Staff category meeting colonel boards while IPZ and BPZ continue to be promoted 9 of 12 times below the rates of their counterparts on the Air Staff. Those IPZ have had five straight boards of rates lower than their Air Staff counterparts. Officers BPZ have only met the promotion expectations two of six times; however, this was on two of the last three boards which perhaps shows a positive trend. Further, APZ rates have been met 50 percent of the time. During the last 3 years, rates have only met promotion expectations two of nine times as compared to four of nine times for the first three years of tracking.

Table 7: As a Group Promotion Rate Comparison by Board to Colonel Joint Staff

To Col		Percent	Met	Percent	Met	Percent	Met	
Year	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
CY89	JS Ave	60.6	Yes	1.9	No	40.0	Yes	2 of 3
	HQ Ave	58.8	N/A	8.9	N/A	8.8	N/A	
CY90	JS Ave	58.1	No	5.4	No	14.3	Yes	1 of 3
	HQ Ave	65.2	N/A	7.0	N/A	8.5	N/A	
CY91	JS Ave	64.1	No	3.5	No	9.1	Yes	1 of 3
	HQ Ave	65.8	N/A	8.0	N/A	5.0	N/A	
CY92	JS Ave	59.6	No	8.3	Yes	0.0	No	1 of 3
	HQ Ave	66.2	N/A	7.0	N/A	2.4	N/A	
CY93	JS Ave	50.0	No	4.7	No	9.1	No	0 of 3
	HQ Ave	67.9	N/A	6.4	N/A	10.7	N/A	
CY94	JS Ave	57.7	No	8.7	Yes	0.0	No	1 of 3
	HQ Ave	60.5	N/A	7.3	N/A	2.4	N/A	
	Rate	1 of 6		2 of 6		3 of 6		6 of 18

Source: Promotion statistics provided by AFMPC/DPMYAP.

Note: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Table 8 shows JSOs meeting colonel boards while IPZ and BPZ continue to be promoted 11 out of 12 times below the rates of their counterparts on the Air Staff. Those IPZ have had five consecutive boards of rates lower than their Air Staff counterparts. JSOs BPZ have never met the promotion expectations. Further, APZ rates are at 50 percent. During the last three years, none of the categories met the promotion expectations as compared to the first three years of tracking, when AF complied four of nine times.

Table 8: As a Group Promotion Rate Comparison by Board to Colonel JSO

To Col		Percent	Met	Percent	Met	Percent	Met	
Year	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
CY89	JSO	68.1	Yes	5.4	No	14.3	Yes	2 of 3
	HQ Ave	58.8	N/A	8.9	N/A	8.8	N/A	
CY90	JSO	64.0	No	6.8	No	16.9	Yes	1 of 3
	HQ Ave	65.2	N/A	7.0	N/A	8.5	N/A	
CY91	JSO	60.6	No	4.0	No	5.9	Yes	1 of 3
	HQ Ave	65.8	N/A	8.0	N/A	5.0	N/A	
CY92	JSO	54.2	No	6.8	No	1.6	No	0 of 3
	HQ Ave	66.2	N/A	7.0	N/A	2.4	N/A	
CY93	JSO	62.7	No	4.9	No	2.9	No	0 of 3
	HQ Ave	67.9	N/A	6.4	N/A	10.7	N/A	
CY94	JSO	59.5	No	4.5	No	0.0	No	0 of 3
	HQ Ave	60.5	N/A	7.3	N/A	2.4	N/A	
	Rate	1 of 6		0 of 6		3 of 6		4 of 18

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Table 9 shows for officers placed in the Other Joint category meeting colonel boards while BPZ continue to be promoted five of six times below the rates of their counterparts in the AF. Those IPZ and APZ have had good success.

Table 9: As a Group Promotion Rate Comparison by Board to Colonel Other Joint

To Col		Percent	Met	Percent	Met	Percent	Met	
Year	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
CY89	OJ Ave	39.4	No	1.2	No	5.0	Yes	1 of 3
	Svc Ave	44.1	N/A	3.0	N/A	2.9	N/A	
CY90	OJ Ave	45.6	Yes	2.3	No	3.3	Yes	2 of 3
	Svc Ave	44.0	N/A	3.1	N/A	2.8	N/A	
CY91	OJ Ave	47.6	Yes	1.8	No	1.8	Yes	2 of 3
	Svc Ave	45.0	N/A	2.9	N/A	1.8	N/A	
CY92	OJ Ave	44.4	Yes	1.1	No	1.4	Yes	2 of 3
	Svc Ave	41.8	N/A	2.9	N/A	0.9	N/A	
CY93	OJ Ave	55.7	Yes	2.8	Yes	0.0	No	2 of 3
	Svc Ave	41.6	N/A	2.5	N/A	4.5	N/A	
CY94	OJ Ave	42.8	Yes	1.7	No	3.1	No	1 of 3
	Svc Ave	41.9	N/A	3.6	N/A	1.3	N/A	
	Rate	5 of 6		1 of 6		4 of 6		10 of 18

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Table 10 shows for officers placed in the Joint Staff category meeting lieutenant colonel boards while IPZ and BPZ continue to be promoted 9 out of 14 times below the rates of their counterparts on the Air Staff. Those IPZ have met expectations on two of the last three board which perhaps shows a successful trend. Additionally, APZ rates are at 50 percent.

Table 10: As a Group Promotion Rate Comparison by board to Lieutenant Colonel Joint Staff

To LtC		Percent	Met	Percent	Met	Percent	Met	
Year	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
CY89	JS Ave	91.7	No	7.4	No	37.5	Yes	1 of 3
	HQ Ave	92.1	N/A	8.2	N/A	18.2	N/A	
CY90	JS Ave	84.6	No	15.0	Yes	0.0	No	1 of 3
	HQ Ave	91.5	N/A	8.4	N/A	3.8	N/A	
CY91A	JS Ave	92.9	No	11.1	No	37.5	Yes	1 of 3
	HQ Ave	93.9	N/A	11.5	N/A	8.8	N/A	
CY91B	JS Ave	84.2	No	7.1	Yes	33.3	Yes	2 of 3
	HQ Ave	87.3	N/A	6.7	N/A	9.1	N/A	
CY92	JS Ave	88.9	Yes	5.0	No	0.0	No	1 of 3
	HQ Ave	88.1	N/A	6.7	N/A	10.8	N/A	
CY93	JS Ave	92.3	Yes	8.3	Yes	0.0	No	2 of 3
	HQ Ave	89.1	N/A	3.1	N/A	11.4	N/A	
CY94	JS Ave	84.4	No	5.6	No	N/A	N/A	0 of 2
	HQ Ave	85.0	N/A	8.2	N/A	N/A	N/A	
	Rate	2 of 7		3 of 7		3 of 6		8 of 20

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Table 11 shows that JSOs meeting lieutenant colonel boards (all three zones) continue to be promoted 15 out of 19 times below the rates of their counterparts on the Air Staff. Those IPZ had a five board 'dry spell' until meeting the expectations on the CY94 board which may signal the beginning of a successful trend. JSOs BPZ have never met the promotion expectations. Last, APZ rates met expectations on the first two boards; however, have not met expectations on the last five boards.

Table 11: As a Group Promotion Rate Comparison by Board to Lieutenant Colonel JSO

To LtC		Percent	Met	Percent	Met	Percent	Met	
Year	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
CY89	JSO	92.9	Yes	5.5	No	57.1	Yes	2 of 3
	HQ Ave	92.1	N/A	8.2	N/A	18.2	N/A	
CY90	JSO	78.1	No	7.3	No	17.0	Yes	1 of 3
	HQ Ave	91.5	N/A	8.4	N/A	3.8	N/A	
CY91A	JSO	85.2	No	3.4	No	5.9	No	0 of 3
	HQ Ave	93.9	N/A	11.5	N/A	8.8	N/A	
CY91B	JSO	76.4	No	2.1	No	7.2	No	0 of 3
	HQ Ave	87.3	N/A	6.7	N/A	9.1	N/A	
CY92	JSO	71.3	No	0.0	No	3.4	No	0 of 3
	HQ Ave	88.1	N/A	6.7	N/A	10.8	N/A	
CY93	JSO	80.9	No	N/A	N/A	1.6	No	0 of 2
	HQ Ave	89.1	N/A	N/A	N/A	11.4	N/A	
CY94	JSO	100.0	Yes	N/A	N/A	3.1	No	1 of 2
	HQ Ave	85.0	N/A	N/A	N/A	18.8	N/A	
	Rate	2 of 7		0 of 5		2 of 7		4 of 19

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Table 12 shows officers in the Other Joint category meeting colonel boards while APZ continue to be promoted four of seven times below the rates of their counterparts in the AF. Those IPZ and BPZ have had good success.

**Table 12: As a Group Promotion Rate Comparison by Board to Lieutenant Colonel
Other Joint**

To LtC		Percent	Met	Percent	Met	Percent	Met	
Year	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
CY89	OJ Ave	69.5	Yes	2.4	No	9.5	Yes	2 of 3
	Svc Ave	63.6	N/A	3.0	N/A	6.5	N/A	
CY90	OJ Ave	73.5	Yes	4.9	Yes	7.6	Yes	3 of 3
	Svc Ave	64.2	N/A	3.4	N/A	5.3	N/A	
CY91A	OJ Ave	74.4	Yes	2.8	Yes	2.7	No	2 of 3
	Svc Ave	65.8	N/A	2.3	N/A	2.8	N/A	
CY91B	OJ Ave	71.1	Yes	2.9	Yes	4.9	Yes	3 of 3
	Svc Ave	67.0	N/A	2.4	N/A	2.1	N/A	
CY92	OJ Ave	70.4	Yes	3.1	Yes	1.2	No	2 of 3
	Svc Ave	63.4	N/A	1.7	N/A	1.5	N/A	
CY93	OJ Ave	69.2	Yes	1.6	No	2.1	No	1 of 3
	Svc Ave	62.9	N/A	1.9	N/A	2.4	N/A	
CY94	OJ Ave	66.2	Yes	4.6	Yes	3.1	No	2 of 3
	Svc Ave	62.9	N/A	3.1	N/A	4.3	N/A	
	Rate	7 of 7		5 of 7		3 of 7		15 of 21

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Table 13 shows officers in the Joint Staff category meeting major boards have faired well.

Table 13: As a Group Promotion Rate Comparison by Board to Major Joint Staff

To Maj		Percent	Met	Percent	Met	Percent	Met	
Year	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
CY88	JS Ave	100.0	Yes	7.7	No	N/A	N/A	1 of 2
	HQ Ave	100.0	N/A	12.1	N/A	N/A	N/A	
CY89	JS Ave	100.0	Yes	28.6	Yes	N/A	N/A	2 of 2
	HQ Ave	98.4	N/A	9.4	N/A	N/A	N/A	
CY91	JS Ave	100.0	Yes	N/A	N/A	N/A	N/A	1 of 1
	HQ Ave	94.2	N/A	N/A	N/A	N/A	N/A	
CY92	JS Ave	N/A	N/A	20.0	Yes	N/A	N/A	1 of 1
	HQ Ave	N/A	N/A	11.1	N/A	N/A	N/A	
CY93	JS Ave	N/A	N/A	0.0	No	N/A	N/A	0 of 1
	HQ Ave	N/A	N/A	14.9	N/A	N/A	N/A	
CY94	JS Ave	66.7	No	N/A	N/A	N/A	N/A	0 of 1
	HQ Ave	94.3	N/A	N/A	N/A	N/A	N/A	
	Rate	3 of 4		2 of 4		N/A		5 of 8

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Table 14 shows officers in the Other Joint category meeting major boards have had good success.

Table 14: As a Group Promotion Rate Comparison by Board to Major Other Joint

To Maj		Percent	Met	Percent	Met	Percent	Met	
Year	Cat	IPZ %	Law	BPZ %	Law	APZ %	Law	Rate
CY88	OJ Ave	92.9	Yes	2.6	Yes	33.3	Yes	3 of 3
	Svc Ave	83.0	N/A	0.9	N/A	7.6	N/A	
CY89	OJ Ave	89.3	Yes	5.4	Yes	20.0	Yes	3 of 3
	Svc Ave	83.9	N/A	2.3	N/A	9.1	N/A	
CY91	OJ Ave	78.9	Yes	2.1	No	18.2	Yes	2 of 3
	Svc Ave	74.5	N/A	2.2	N/A	7.7	N/A	
CY92	OJ Ave	78.3	Yes	3.4	Yes	14.3	Yes	3 of 3
	Svc Ave	75.2	N/A	1.8	N/A	7.6	N/A	
CY93	OJ Ave	85.3	Yes	6.5	Yes	11.1	No	2 of 3
	Svc Ave	73.1	N/A	1.5	N/A	13.7	N/A	
CY94	OJ Ave	78.4	Yes	0.0	No	0.0	No	1 of 3
	Svc Ave	72.6	N/A	1.8	N/A	13.2	N/A	
	Rate	6 of 6		4 of 6		4 of 6		14 of 18

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category or which designates those blocks next to AF percentage rates which are the goal to be met, not the rates of contention.

Based on the comparison in Scheme two, promotion boards to colonel and lieutenant colonel have had difficulty in meeting promotion expectations in the following areas:

- Officers meeting colonel boards coded as Joint Staff
- JSOs meeting colonel boards
- Officers meeting colonel boards BPZ coded as Other Joint
- Officers meeting lieutenant colonel boards coded as Joint Staff
- JSOs meeting lieutenant colonel boards
- Officers meeting lieutenant colonel boards APZ coded as Other Joint

Appendix C5: Promotion Comparison Scheme 3

This comparison is a board-by-board review of promotion rates both in the serving-in and have-served categories. As a reminder, the Joint Staff (JS Ave) and JSO averages (JSO) are compared to the AF Headquarters average (HQ Ave) and the Other Joint average (OJ Ave) is compared to the Service average (Svc Ave). Tables 15-37 show for promotion boards to colonel (Col), lieutenant colonel (LtC), and major (Maj), the percentage of selection in the particular promotion zone (IPZ, BPZ, and APZ) in the joint and AF categories for each promotion board. Added to the tables under the columns titled 'Met Law' is whether the category met the expectations in the law (Yes or No provided) and the number of times (the 'Rate') the category has met the expectations of the law. Those rates denoting when categories have met the law less than 50 percent of the time are bolded. The percentages for this comparison have been rounded to the nearest whole number.

Table 15 shows that 8 of 12 times officers on the Joint Staff meeting the colonels' board IPZ will get selected at a rate lower than their Air Staff counterparts. Those serving-in the Joint Staff were selected at a rate higher than the Air Staff rate on two of the last three boards. This may indicate a positive trend. However, those officers that have-served-in the Joint Staff have only met the promotion expectations on one board since 1989.

Table 15: Promotion Rate Comparison by Board to Colonel Joint Staff IPZ

Colonel Board Joint Staff IPZ						
	Serving-In			Have-Served		
Board	Joint Staff %	Service Headquarters %	Met Law	Joint Staff %	Service Headquarters %	Met Law
CY89	58	59	No	67	58	Yes
CY90	55	60	No	64	70	No
CY91	59	64	No	71	67	Yes
CY92	74	48	Yes	44	74	No
CY93	50	52	No	50	79	No
CY94	86	50	Yes	42	68	No
Rate			2 of 6			2 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 16 shows that 10 of 12 times officers on the Joint Staff meeting the colonels' board BPZ will get selected at a rate lower than their Air Staff counterparts. Those serving-in the Joint Staff were selected higher than the Air Staff rate on two of the last three boards. This may indicate a positive trend. However, those officers that have-served-in the Joint Staff have not met the promotion expectations on any boards so far.

Table 16: Promotion Rate Comparison by Board to Colonel Joint Staff BPZ

Joint Staff Colonel BPZ						
	Serving-In			Have-Served		
Board	Joint Staff %	Service Headquarters %	Met Law	Joint Staff %	Service Headquarters %	Met Law
CY89	2	4	No	0	23	No
CY90	6	8	No	4	6	No
CY91	2	7	No	6	9	No
CY92	9	5	Yes	7	9	No
CY93	3	5	No	6	8	No
CY94	6	3	Yes	9	10	No
Rate			2 of 6			0 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 17 shows officers serving-in the Joint Staff meeting the colonels' board APZ have met the majority of the promotion expectations. However, those officers who have-served-in the Joint Staff have only met the promotion expectations on two board.

Table 17: Promotion Rate Comparison by Board to Colonel Joint Staff APZ

Joint Staff Colonel APZ						
	Serving-In			Have-Served		
Board	Joint Staff %	Service Headquarters %	Met Law	Joint Staff %	Service Headquarters %	Met Law
CY89	40	11	Yes	N/A	N/A	N/A
CY90	29	5	Yes	0	11	No
CY91	14	10	Yes	7	2	Yes
CY92	0	0	Yes	0	3	No
CY93	0	9	No	14	12	Yes
CY94	0	0	Yes	0	4	No
Rate			5 of 6			2 of 5

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 18 shows 8 of 13 times officers on the Joint Staff meeting the lieutenant colonels' board IPZ are selected at a rate lower than their Air Staff counterparts. Those serving-in the Joint Staff were selected higher than the Air Staff rate on the last two boards. This indicates a positive trend. Those officers that have-served-in the Joint Staff have met the expectation 50 percent of the time.

**Table 18: Promotion Rate Comparison by Board to Lieutenant Colonel Joint Staff
IPZ**

Joint Staff Lt Col IPZ						
	Serving-In			Have-Served		
Board	Joint Staff %	Service Headquarters %	Met Law	Joint Staff %	Service Headquarters %	Met Law
CY89	91	92	No	100	100	Yes
CY90	84	90	No	100	100	Yes
CY91A	93	94	No	N/A	N/A	N/A
CY91B	88	92	No	67	78	No
CY92	85	86	No	100	92	Yes
CY93	100	87	Yes	67	94	No
CY94	96	83	Yes	50	89	No
Rate			2 of 7			3 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 19 shows officers on the Joint Staff meeting the lieutenant colonels' board BPZ have met the promotion expectations on all boards. However, those officers that have-served-in the Joint Staff have only met the promotion expectations on one boards so far.

Table 19: Promotion Rate Comparison by Board to Lieutenant Colonel Joint Staff BPZ

Joint Staff Lt Col BPZ						
	Serving-In			Have-Served		
Board	Joint Staff %	Service Headquarters %	Met Law	Joint Staff %	Service Headquarters %	Met Law
CY89	8	8	Yes	0	14	No
CY90	15	8	Yes	N/A	N/A	N/A
CY91A	13	10	Yes	0	14	No
CY91B	6	6	Yes	10	8	Yes
CY92	7	7	Yes	0	8	No
CY93	10	2	Yes	0	6	No
CY94	8	7	Yes	0	15	No
Rate			7 of 7			1 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 20 shows officers on the Joint Staff meeting the lieutenant colonels' board APZ have a 50/50 chance of get selected at a rate equal to or higher than their Air Staff counterparts. However, those officers that have-served on the Joint Staff have not met the promotion expectations on the last three boards.

Table 20: Promotion Rate Comparison by Board to Lieutenant Colonel Joint Staff APZ

Joint Staff Lt Col APZ						
	Serving-In			Have-Served		
Board	Joint Staff %	Service Headquarters %	Met Law	Joint Staff %	Service Headquarters %	Met Law
CY89	60	19	Yes	0	0	Yes
CY90	0	5	No	0	0	Yes
CY91A	67	18	Yes	20	0	Yes
CY91B	100	13	Yes	0	6	No
CY92	0	13	No	0	10	No
CY93	0	13	No	0	10	No
CY94	N/A	N/A	N/A	N/A	N/A	N/A
Rate			3 of 6			3 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 21 shows that six of seven times officers on the Joint Staff meeting the majors' board IPZ will get selected at a rate equal to or higher than their Air Staff counterparts. Those officers who have-served-in the Joint Staff have met the promotion expectations on all boards so far.

Table 21: Promotion Rate Comparison by Board to Major Joint Staff IPZ

Joint Staff Major IPZ						
	Serving-In			Have-Served		
Board	Joint Staff %	Service Headquarters %	Met Law	Joint Staff %	Service Headquarters %	Met Law
CY88	100	100	Yes	100	100	Yes
CY89	100	98	Yes	N/A	N/A	N/A
CY91	100	97	Yes	100	87	Yes
CY92	N/A	N/A	N/A	N/A	N/A	N/A
CY93	N/A	N/A	N/A	N/A	N/A	N/A
CY94	0	96	No	100	86	Yes
Rate			3 of 4			3 of 3

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 22 shows four of seven times officers on the Joint Staff meeting the majors' board BPZ will get selected at a rate lower than their Air Staff counterparts. Those serving-in the Joint Staff were selected higher than the Air Staff rate on two of the last three boards that considered joint officers. This may indicate a positive trend. However, those officers that have-served-in the Joint Staff have only met the promotion expectations on one board so far.

Table 22: Promotion Rate Comparison by Board to Major Joint Staff BPZ

Joint Staff Major BPZ						
	Serving-In			Have-Served		
Board	Joint Staff %	Service Headquarters %	Met Law	Joint Staff %	Service Headquarters %	Met Law
CY88	8	9	No	N/A	N/A	N/A
CY89	17	6	Yes	100	30	Yes
CY91	N/A	N/A	N/A	N/A	N/A	N/A
CY92	33	11	Yes	0	14	No
CY93	0	11	No	0	27	No
CY94	N/A	N/A	N/A	N/A	N/A	N/A
Rate			2 of 4			1 of 3

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 23 shows JSOs meeting the colonel boards IPZ do fairly well when compared to those officer serving-in the Air Staff. However when compared to officers who have-served on the Air Staff, JSOs have only met promotion expectations on one of six boards; with that being the CY89 board.

Table 23: Promotion Rate Comparison by Board to Colonel JSO IPZ

Colonel JSO IPZ						
		Serving-In			Have-Served	
Board	JSO %	Service Headquarters %	Met Law	JSO %	Service Headquarters %	Met Law
CY89	68	59	Yes	68	58	Yes
CY90	64	60	Yes	64	70	No
CY91	61	64	No	61	67	No
CY92	54	48	Yes	54	74	No
CY93	63	52	Yes	63	79	No
CY94	60	50	Yes	60	68	No
Rate			5 of 6			1 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 24 shows JSOs meeting the colonel boards BPZ do well when compared to those officer serving-in the Air Staff. However when compared to officers who have-served on the Air Staff, JSOs have only met promotion expectations on one of six boards; with that being the CY90 board.

Table 24: Promotion Rate Comparison by Board to Colonel JSO BPZ

Colonel JSO BPZ						
		Serving-In			Have-Served	
Board	JSO %	Service Headquarters %	Met Law	JSO %	Service Headquarters %	Met Law
CY89	5	4	Yes	5	23	No
CY90	7	8	No	7	6	Yes
CY91	4	7	No	4	9	No
CY92	7	5	Yes	7	9	No
CY93	5	5	Yes	5	8	No
CY94	5	3	Yes	5	10	No
Rate			4 of 6			1 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 25 shows JSOs meeting the colonel boards APZ do well when compared to those officer serving-in and that have-served on the Air Staff.

Table 25: Promotion Rate Comparison by Board to Colonel JSO APZ

Colonel JSO APZ						
		Serving-In			Have-Served	
Board	JSO %	Service Headquarters %	Met Law	JSO %	Service Headquarters %	Met Law
CY89	14	11	Yes	14	7	Yes
CY90	17	5	Yes	17	11	Yes
CY91	6	10	No	6	2	Yes
CY92	2	0	Yes	2	3	No
CY93	3	9	No	3	12	No
CY94	0	0	Yes	0	4	No
Rate			4 of 6			3 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 26 shows that 11 of 14 times JSOs meeting the lieutenant colonel board IPZ will get selected at a rate lower than their Air Staff counterparts. JSOs had a five board 'dry spell' compared to officers serving-in the Air Staff; but met promotion expectation on the CY94 board. JSOs compared to officers who have-served on the Air Staff have only met the promotion expectations on one board so far; the CY94 board.

Table 26: Promotion Rate Comparison by Board to Lieutenant Colonel JSO IPZ

Lt Col JSO IPZ						
		Serving-In			Have-Served	
Board	JSO %	Service Headquarters %	Met Law	JSO %	Service Headquarters %	Met Law
CY89	93	92	Yes	93	100	No
CY90	78	90	No	78	100	No
CY91A	85	94	No	85	95	No
CY91B	76	92	No	76	78	No
CY92	71	86	No	71	92	No
CY93	81	87	No	81	94	No
CY94	100	83	Yes	100	89	Yes
Rate			2 of 7			1 of 7

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 27 shows JSOs meeting the lieutenant colonel's board BPZ are selected at a rate lower than their Air Staff counterparts.

Table 27: Promotion Rate Comparison by Board to Lieutenant Colonel JSO BPZ

Lt Col JSO BPZ						
		Serving-In			Have-Served	
Board	JSO %	Service Headquarters %	Met Law	JSO %	Service Headquarters %	Met Law
CY89	6	8	No	6	14	No
CY90	7	8	No	7	9	No
CY91A	3	10	No	3	14	No
CY91B	2	6	No	2	8	No
CY92	0	7	No	0	8	No
CY93	N/A	N/A	N/A	N/A	N/A	N/A
CY94	N/A	N/A	N/A	N/A	N/A	N/A
Rate			0 of 5			0 of 5

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 28 shows JSOs meeting the lieutenant colonel's board APZ are selected at a rate lower rate than their serving-in Air Staff counterparts five of seven times and have not met promotion expectations in five boards. JSOs compared to officers who have-served on the Air Staff have faired well.

Table 28: Promotion Rate Comparison by Board to Lieutenant Colonel JSO APZ

Lt Col JSO APZ						
		Serving-In			Have-Served	
Board	JSO %	Service Headquarters %	Met Law	JSO %	Service Headquarters %	Met Law
CY89	57	19	Yes	57	0	Yes
CY90	17	5	Yes	17	0	Yes
CY91A	6	18	No	6	0	Yes
CY91B	7	13	No	7	6	Yes
CY92	3	13	No	3	10	No
CY93	2	13	No	2	10	No
CY94	3	25	No	3	0	Yes
Rate			2 of 7			5 of 7

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 29 shows officers serving-in Other Joint assignments meeting the colonel's board IPZ have faired well. However, officers that have-served-in Other Joint assignments have only met promotion expectations on one board in CY91.

Table 29: Promotion Rate Comparison by Board to Colonel Other Joint IPZ

Colonel Other Joint IPZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY89	42	44	No	27	44	No
CY90	48	44	Yes	40	44	No
CY91	49	45	Yes	46	45	Yes
CY92	55	42	Yes	33	42	No
CY93	70	42	Yes	38	42	No
CY94	52	42	Yes	33	42	No
Rate			5 of 6			1 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 30 shows officers coded as Other Joint meeting the colonel's board BPZ are selected at lower rates than their AF counterparts 9 of 12 times. Those serving-in Other Joint assignments have only met promotion expectations on one board in CY93. Those who have-served-in Other Joint assignments met promotion expectations on two boards in CYs 90 and 93.

Table 30: Promotion Rate Comparison by Board to Colonel Other Joint BPZ

Colonel Other Joint BPZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY89	1	3	No	1	3	No
CY90	2	3	No	3	3	Yes
CY91	2	3	No	2	3	No
CY92	1	3	No	1	3	No
CY93	3	3	Yes	3	3	Yes
CY94	2	4	No	1	4	No
Rate			1 of 6			2 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 31 shows officers serving-in Other Joint assignments meeting the colonel's board APZ do fairly well. Those that have-served-in Other Joint assignments have met promotion expectations on one board in CY89 and have seen a five year 'dry spell.'

Table 31: Promotion Rate Comparison by Board to Colonel Other Joint APZ

Colonel Other Joint APZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY89	6	3	Yes	3	3	Yes
CY90	6	3	Yes	0	3	No
CY91	3	2	Yes	1	2	No
CY92	4	1	Yes	0	1	No
CY93	0	5	No	0	5	No
CY94	5	1	Yes	0	1	No
Rate			5 of 6			1 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 32 shows officers coded as Other Joint meeting lieutenant colonel boards IPZ do very well.

Table 32: Promotion Rate Comparison by Board to Lieutenant Colonel Other Joint IPZ

Lt Col Other Joint IPZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY89	70	64	Yes	69	64	Yes
CY90	77	64	Yes	63	64	No
CY91A	78	66	Yes	66	66	Yes
CY91B	70	67	Yes	75	67	Yes
CY92	72	63	Yes	66	63	Yes
CY93	70	63	Yes	68	63	Yes
CY94	69	63	Yes	61	63	No
Rate			7 of 7			5 of 7

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 33 shows officers coded as Other Joint meeting lieutenant colonel boards BPZ do very well.

Table 33: Promotion Rate Comparison by Board to Lieutenant Colonel Other Joint BPZ

Lt Col Other Joint BPZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY89	2	3	No	3	3	Yes
CY90	6	3	Yes	3	3	Yes
CY91A	3	2	Yes	2	2	Yes
CY91B	4	2	Yes	1	2	No
CY92	3	2	Yes	2	2	Yes
CY93	2	2	Yes	2	2	Yes
CY94	4	3	Yes	11	3	Yes
Rate			6 of 7			6 of 7

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 34 shows officers serving-in Other Joint meeting lieutenant colonel boards APZ have met promotion expectations on all boards. Those who have-served have met promotion expectations on three of seven boards; however, not meeting the expectations on the last three boards.

Table 34: Promotion Rate Comparison by Board to Lieutenant Colonel Other Joint APZ

Lt Col Other Joint APZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY89	10	7	Yes	9	7	Yes
CY90	10	5	Yes	5	5	Yes
CY91A	4	3	Yes	2	3	No
CY91B	7	2	Yes	4	2	Yes
CY92	3	2	Yes	0	2	No
CY93	4	2	Yes	1	2	No
CY94	5	4	Yes	0	4	No
Rate			7 of 7			3 of 7

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 35 shows officers coded as Other Joint meeting major boards IPZ have met the majority of the expectations.

Table 35: Promotion Rate Comparison by Board to Major Other Joint IPZ

Major Other Joint IPZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY88	93	83	Yes	89	83	Yes
CY89	92	84	Yes	83	84	No
CY91	81	75	Yes	76	75	Yes
CY92	88	75	Yes	68	75	No
CY93	91	73	Yes	79	73	Yes
CY94	80	73	Yes	74	73	Yes
Rate			6 of 6			4 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 36 shows officers coded as Other Joint meeting major boards BPZ also do very well.

Table 36: Promotion Rate Comparison by Board to Major Other Joint BPZ

Major Other Joint BPZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY88	3	1	Yes	0	1	No
CY89	4	2	Yes	10	2	Yes
CY91	3	2	Yes	0	2	No
CY92	2	2	Yes	5	2	Yes
CY93	5	2	Yes	8	2	Yes
CY94	0	2	No	0	2	No
Rate			5 of 6			3 of 6

Source: Promotion statistics provided by AFMPC/DPMYAP.

NOTE: Annotated in certain blocks is 'N/A' which provides that no joint officers were considered in that category.

Table 37 shows that officers serving-in Other Joint meeting major boards APZ do well. However, those that have served-in Other Joint duties have only met promotion expectations on one board in CY91.

Table 37: Promotion Rate Comparison by Board to Major Other Joint APZ

Major Other Joint APZ						
	Serving-In			Have-Served		
Board	Other Joint %	Service Average %	Met Law	Other Joint %	Service Average %	Met Law
CY88	40	8	Yes	0	8	No
CY89	50	9	Yes	0	9	No
CY91	0	8	No	29	8	Yes
CY92	100	8	Yes	0	8	No
CY93	50	14	Yes	0	14	No
CY94	0	13	No	N/A	N/A	N/A
Rate			4 of 6			1 of 5

Promotion statistics provided by AFMPC/DPMYAP.

NOTE: N/A means no joint officers were considered in the category provided.

Looking at Scheme 3 review, the following are potential problem areas:

- Officers meeting colonel boards IPZ and BPZ serving-in Joint Staff
- Officers meeting colonel boards IPZ, BPZ, and APZ that have-served-in Joint Staff
- Officers meeting lieutenant colonel boards IPZ serving-in Joint Staff
- Officers meeting lieutenant colonel boards BPZ that have-served-in Joint Staff
- Officers meeting major boards BPZ have-served-in Joint Staff
- JSO meeting colonel boards IPZ and BPZ (compared to have-served Service headquarters)
- JSOs meeting lieutenant colonel boards IPZ and BPZ
- JSOs meeting lieutenant colonel boards APZ (compared to serving-in Service headquarters)
- Officers meeting colonel boards BPZ serving-in Other Joint duty
- Officers meeting colonel boards IPZ, BPZ, and APZ that have-served-in Other Joint duty
- Officers meeting lieutenant colonel boards APZ that have-served-in Other Joint duty
- Officers meeting major boards APZ that have-served-in Other Joint duty

Notes

¹ Senate Committee on Armed Services, Defense Organization: The Need For Change, 99th Cong., 1st sess., S. Prt 99-86, 16 October 1985.

² Press Release, “Goldwater and Nunn Announce Conference Agreement on Defense Reorganization Bill.”

³ Staff Summary Sheet, HQ USAF (DPXOP), subject: Secretary of the Air Force Formal Charge to Air Force Selection Boards, 26 June 1987.

⁴ Memorandum, DepSecDef, 21 May 1987.

⁵ Staff Summary Sheet, DPXOP, 26 June 1987.

⁶ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: USAF List of Selectees to the Grade of Major, file copy, Undated.

⁷ Memorandum, Vice Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Lieutenant Colonel Nominations, 21 June 1989.

⁸ Memorandum, DepSecDef, 19 June 1989.

⁹ JCS Admin Pub 1.2, IX.

¹⁰ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Colonel Nominations, 16 August 1989.

¹¹ Memorandum, Assistant Secretary of Defense to the Secretary of Defense, subject: Air Force Officer Nomination, undated.

¹² Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Promotion List—Lieutenant Colonel, 23 February 1990.

¹³ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Colonel Promotion Board Results, 24 August 1990.

¹⁴ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Lieutenant Colonel Promotion Results, 20 May 1991.

¹⁵ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Major Promotion Results, 9 August 1991.

¹⁶ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Colonel Promotion Selection Board, 21 October 1991.

¹⁷ Memorandum, Secretary of the Air Force, 9 October 1991.

¹⁸ Staff Summary Sheet, Air Force Military Personnel Center (DPMAB), subject: Changes to the Officer Selection Brief (OSB) and Formal Charge for Promotion Boards, 30 October 1991.

¹⁹ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Lieutenant Colonel Promotion Results, 16 January 1992.

²⁰ Department of Defense Directive (DoDD) 1320.12, Defense Officer Promotion Program, 4 February 1992, 6.

²¹ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Colonel Promotion Results, 14 August 1992.

²² Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Lieutenant Colonel Promotion Results, 21 December 1992.

²³ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Major Promotion Results, 14 January 1993.

²⁴ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Colonel Promotion Results, 17 August 1993.

²⁵ Captain Donald Barnes, 28 March 1995.

²⁶ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Lieutenant Colonel Promotion Results, 30 November 1993.

²⁷ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Major Promotion Results, 19 January 1994.

²⁸ Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 1330.02, Review of Promotion Selection Board Results by the Chairman of the Joint Chiefs of Staff, 7 January 1994, 5.

²⁹ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Major Promotion Results, 3 October 1994.

³⁰ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Major Promotion Results, 16 November 1994.

³¹ Memorandum, Chairman of the Joint Chiefs of Staff to the Secretary of the Air Force, subject: Air Force Major Promotion Results, 15 September 1994.

Appendix D: Joint PME Phase II Prioritization

	Definitely Schedule (+1 Point Each)	Schedule (+/- 0 Points)	Alternate Only (-1 Point Each)	Points
Joint Assessment	Good	Gray	Weak	
ISS/SSS In-Res	Yes	Not Eligible	Eligible, Not Selected	
Promotion Timing	BPZ	On Time	Deferred	
Joint Utility	High	Medium	Low	
JD Status	Non-COS, Leaving Joint w/in 12 mos or enroute to overseas joint	In Joint, going CONUS Joint, or has served Joint	Has not served Joint and is not projected to a Joint assignment	

Regarding: _____ Date: _____

Total Points	
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RJJ1 Assessment:

Score >2, Schedule ASAP (or as requested) to attend AFSC (60% reserve)

Score 0 or 1, Schedule when able (40% cap)

Score <0, Carry as alternate only

Assignment Team Assessment:

Concur

Nonconcur

If Nonconcur, reason is

Subjective reprioritization requires Division Chief or higher approval because someone else (possibly, of the same specialty) will be bumped to accommodate the reprioritized officer. Do you request this approval?

Yes

No

Assignment Officer: _____

Division Level or Higher Input (if desired):

Reprioritize—Bump another officer, if necessary, to schedule as requested

Do not change priority

Office Symbol/Initials: _____

Appendix E1: Air Command and Staff College Survey

Our Air Command and Staff College research team is conducting an analysis of the AF's implementation of Title IV, Goldwater-Nichols legislation. This was Congress's attempt to improve Joint operations by directing Services to implement specific mandates that would ensure a quality Joint officer force. Our research team is looking at AF legislative compliance in the areas of promotions, Joint Specialty Officer designations, Joint assignments and Joint Professional Military Education. Additionally, we are also interested in the impact of this legislation on Officer Professional Development—an area which we have found little historical research. To help us in this endeavor, we are asking Air Command and Staff College students to complete the following survey. It was kept short to minimize the time you'll need to invest. We do appreciate your support in this important project. Thank You.

1. What is your career field?

A. Rated B. Non-Rated Line/Support D. Non-Line
2. In your previous assignments, did you receive training on Officer Professional Development?

A. Yes B. No
3. If you have received a post-school assignment, did you find the assignment through:

A. Electronic Bulletin Board B. AFMPC C. Other (Please List Source)
4. Were you a volunteer for this assignment?

A. Yes B. No
5. Is this assignment to a Joint Duty position?

A. Yes B. No
6. What importance do you view a Joint Duty Assignment (JDA) to your career field?

A. Little Importance B. Moderate Importance C. Great Importance
7. Do you recommend JDA to officers you counsel regarding Officer Professional Development?

A. Sometimes B. Often C. Always

8. Do you perceive a JDA as beneficial to a follow-on 'blue suit' assignment?

A. Of Little Benefit B. Moderately Beneficial C. Greatly Beneficial

9. How do you view the feedback from those in your career field regarding JDAs?

A. Unfavorable B. Favorable C. Very Favorable

Appendix E2: Air Command and Staff College Survey Comments

Comments regarding Question 3: “If you have received a post-school assignment, did you find the assignment through . . . list source.”

“Looking . . . system not helping.” “Making thousands of phone calls to different Pentagon offices.” “I can’t (state assignment source) because it would not look good.” “Self-prior contacts.” “A general called me and told me about it.” “No assignment yet.” “Personal contact.” “Two star called me and offered me a job working for him.” “Word of mouth.” (X2) “Volunteered for a job listed on EBB; gaining organization had already filled position, but suggested another position they forecast at a later date—I subsequently volunteered and was accepted.” “Acquaintance at work . . .” “ACSC classmate.” “Receiving Command.” “A friend of a friend.” “Worked directly with organization.” “Friend.” “Non-volunteer.” “They (the gaining organization) called me and asked me to apply for it.” “Discussed with MAJCOM CINC representative during Job Fair.” (X2) “Call from DCS to watch for EBB.” “Past CC.” “Called somebody I knew.” “DISA resource manager.” “Personal contact.” (X2) “It would be nice to have one.” “It was #38 on my top 10 list.”

Comments regarding Question 6: What importance do you view a JDA to your career field?

“Don’t want to burn any bridges.” “DoD, joint agencies and OSD do not make a sufficient # of joint acquisition positions. Too stingy with JDA designations.” “It’s overhyped, lacking substance.” “Great importance, now after being here (ACSC).”

“Moderate importance—great experience, but average compared to promotion or selection for command.”

Comments regarding Question 7: Do you recommend JDA to officers you counsel regarding OPD?”

“Actually-No.” “Depends on their career goals.” “Never.” “For those interested in military careers.” “If they are of high caliber.”

Comments regarding Question 8: Do you perceive a JDA as beneficial to a follow-on blue suit assignment?

“No benefit.” “If I get what I want.” “Depends on career field.” “For rated and loggies (logistics).”

Comments regarding Question 9: How do you view the feedback from those in your career field regarding JDAs?”

“Nearly non-existent.” “No feedback received.” (X8) “General perception is that JDA has little benefit in returning to fly fighters, not that it is detrimental, but it merely does not help. No better/no worse than other staff follow-ons.” “JDA = filling the squares!” “I have never had a squadron CC who took command following a joint assignment—they all came from TAC/ACC, Pentagon, or command. Several have gone joint after command.”

Appendix F1: Air War College Survey

Our Air Command and Staff College research team is conducting an analysis of the AF's implementation of Title IV, Goldwater-Nichols legislation. This was Congress's attempt to improve Joint operations by directing Services to implement specific mandates that would ensure a quality Joint officer force. Our research team is looking at AF legislative compliance in the areas of promotions, Joint Specialty Officer designations, Joint assignments and Joint Professional Military Education. Additionally, we are also interested in the impact of this legislation on Officer Professional Development—an area which we have found little historical research. To help us in this endeavor, we are asking Air War College students to complete the following survey. It was purposely kept short to minimize the time you invest. Thank You for your support of this important project.

1. What is your career field?

A. Rated B. Non-Rated Line C. Support D. Non-Line
2. In your previous assignments, did you receive training on Officer Professional Development?

A. Yes B. No
3. If you have received a post-school assignment, did you find the assignment through:

A. Electronic Bulletin Board B. AFMPC C. Other (Please List Source)
4. Were you a volunteer for this assignment?

A. Yes B. No
5. Is this assignment to a Joint Duty position?

A. Yes B. No
6. What importance do you view a Joint Duty Assignment (JDA) to your career field?

A. Little Importance B. Moderate Importance C. Great Importance
7. Do you recommend JDA to officers you counsel regarding Officer Professional Development?

A. Sometimes B. Often C. Always

8. Do you perceive a JDA as beneficial to a follow-on “blue suit” assignment?
- A. Of Little Benefit B. Moderately Beneficial C. Greatly Beneficial
9. How do you view the feedback from those in your career field regarding JDAs?
- A. Unfavorable B. Favorable C. Very Favorable

Appendix F2: Air War College Survey Comments

Comments regarding Question 3: “If you have received a post-school assignment, did you find the assignment through . . . list source.”

“Can’t answer questions 3-5, I don’t have an assignment. But, I am using all means, begging, pleading, EBB.” “Trying for the Joint Staff.” “Former boss called me.” “Personal contact.” “Direct hire.” “Word of mouth.” “MAJCOM/DP phone call.” “Request from previous commander.” “Direct hire. Begging, pleading (the old/new assignment system).” “Called someone I knew.” “They found me and told me to “volunteer” via AFMPC.” “Good ol’ boy network.” “Mentor at ACC.” “Friend and MAJCOM.” “No assignment yet.” (X8)

Comments regarding Question 6: What importance do you view a JDA to your career field?

“Great importance—previous joint job at CENTCOM.” “Great importance as long as other Services agree to play joint.” “Little importance, unless one is determined to be a general.” “Zero actual JDAs for my career field.”

Comments regarding Question 7: Do you recommend JDA to officers you counsel regarding OPD?

“At the right time in a career.” “Have not had to do this yet.” “Depends on timing—each case is different.”

Comments regarding Question 8: Do you perceive a JDA as beneficial to a follow-on blue suit assignment?

No comments

Comments regarding Question 9: How do you view the feedback from those in your career field regarding JDAs?

“For line officers-it is a necessary square to fill—painful as it is.” “Mixed feedback—the predominant location, e.g., Pentagon. DC is terrible and the basic job satisfaction is low.”

Appendix G: Air Force Military Personnel Assignment Officer Survey

Our Air Command and Staff College research team is conducting an analysis of the AF's implementation of Title IV, Goldwater-Nichols legislation. This was Congress's attempt at improving Joint operations by directing Services to implement specific mandates that would ensure a quality Joint officer force. Our research team is looking at AF legislative compliance in the areas of promotions, Joint Specialty Officer designations, Joint assignments and Joint Professional Military Education. Additionally, we are also interested in the impact of this legislation on Officer Professional Development—an area which we have found little historical research. To help us in this endeavor, we are asking AFMPC assignment officers to complete the following survey. It was purposely kept short to minimize the time you'll need to invest. We do appreciate your support in this important project. Thank You.

1. What AF Specialty Code(s) do you manage?
2. By AF Specialty Code, approximately what percent of the billets are designated Joint Duty Assignments (JDAs)?

A. < than 10% B. 10% - 20% C. 21% - 30% D. More than 30%
3. In your position as an assignment officer, did you receive training on the principles of Officer Professional Development?

A. Yes B. No
4. What importance do you view a JDA to those AF Specialty Codes you manage?

A. Little importance B. Moderate importance C. Great importance
5. How often do you recommend JDAs to those officers you counsel regarding Officer Professional Development?

A. Always B. Often C. Seldom D. Never
6. Do you perceive a JDA as beneficial to a follow-on "blue suit" assignment?

A. Of Little benefit B. Moderately beneficial C. Greatly Beneficial
7. How do you view the feedback from your "resource" regarding JDAs?

A. Unfavorable B. Favorable C. Very favorable

8. Do you “non-vol” more officers to:

A. Air Force billets

B. Joint Duty Assignments

C. About Equal

9. Based on your experience as an assignment officer, how would you assess the “information level” of those officers you service regarding Joint Duty Assignments?

A. Low

B. Medium

C. High

USAF SCN 95-24

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Vita

Kevin Boggs: Major Boggs received his commission in the AF through the Reserve Officer Training Corps (ROTC) in 1980. He has served as a Consolidated Base Personnel Office (CBPO) Section Chief, ROTC Instructor, Executive Officer, Recorder in the AF Selection Board Secretariat, Action Officer in the Generals' Group and Chief, Pentagon Personnel Flight. After graduation from ACSC, Major Boggs will attend AFSC enroute to his assignment as Exercise Plans Officer, J-1, HQ PACOM, Camp Smith, Hawaii.

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Kathleen Grabowski: Following an enlisted tour as a research and development technician, Major Grabowski received her AF commission in the USAF through Officers Training School (OTS) in 1980. She has served in a variety of positions to include: Personnel Actions Officer, Section Chief at the CBPO and a Protocol Officer at 3rd Air Force. At AFMPC, she worked as an Assignments Officer and an Assignment Policy Officer. She completed a tour as a Squadron Section Commander and Personnel Officer for the Defense Intelligence Agency prior to her arrival at ACSC.

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Harold K. (Ken) James: Following an enlisted tour as an administrative specialist, Major James received his AF commission through OTS in 1980. He has served in various administrative roles to include: Section Commander, Wing Executive Officer, Assistant Division Chief for the Military Airlift Command's Test Agency, and an Aide-de-Camp. He served a tour in NATO's Southern Region where he was assigned duties in logistics as

the CIMIC (equivalent to CRAF) officer. Following this tour, he transitioned to Personnel where he has served at AFMPC in special duty assignments, as Chief PCS Budget/Special Assignment Policy and as Chief, AFMPC Issues Team. Prior to attending ACSC, he was assigned at Keesler Air Force Base, Mississippi as the Commander, Military Personnel Flight. Major James will be the Commander, 17 Mission Support Squadron, Goodfellow AFB, TX following graduation.

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Dale Bourque: Major Bourque received his AF commission through ROTC in 1980. He completed personnel jobs at base-level, AFMPC and Headquarters Air Force and a headquarters section commander job. At base level, he learned how the assignment, PME, and promotion processes work. While stationed at AFMPC, he worked officer assignments and officer force management, and was there for the initial implementation of Title IV. At the Air Staff, he was responsible for officer promotion policy. These jobs give him a unique perspective and background for this paper. Major Bourque completed SOS and ACSC in-residence. Upon graduate from ACSC, he will be assigned to Headquarters Air University as Chief, Personnel Division.

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Julie K. Stanley: Major Stanley received her AF commission through OTS in 1980 after completing a Master's Degree in Counseling Psychology. As a Personnel Officer, she has served as the Chief, Personnel Utilization Section and Chief, Military Personnel Flight while at base-level, in addition to a tour at HQ TAC/DP, where she worked Quality Force issues. At AFMPC, she worked in the Joint Departmental Manning Control Branch, before she became the Executive Officer to the Vice Commander and Commander of the

Center. Major Stanley has been selected to be the Assistant Protocol Officer to the Chairman, Joint Chiefs of Staff upon graduation from Air Command and Staff College. Her permanent address is PO Box 245, Ferrum, VA, 24088.